



OnviCord Web User's Guide Version 5

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Getting Started

You **must have** the latest Windows and Internet Explorer Service Packs installed on your system before continuing. Recent Service Packs are located in the Microsoft folder on the ***Onvicord*** CD. We also recommend that you monitor the Microsoft web site for updates that are appropriate for your system.

Depending on your operating system, the images shown in this document may be slightly different from what you see.

Login

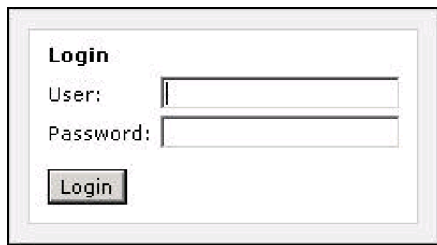
To log in to **OnviCord Web** from your desktop, double-click the **OnviCord Web** icon.



Another method is to launch Internet Explorer from your desktop and type the **OnviCord** web server address (computer or host name) provided by your system administrator in the address bar **OR** select Start->Programs->OnviSource->OnviCord Web.

To log into **OnviCord Web** from the **OnviCord.Agent** application, right-click on the square icon in your system tray, then select **OnviCord Web** from the popup menu.

When the **OnviCord Web** Login screen appears, enter your User Name and Password, then click Login. Both are case sensitive, so verify your CAPS LOCK key is off.

A screenshot of the OnviCord Web login window. It has a title bar, a 'Login' label, a 'User:' label with a text input field, a 'Password:' label with a text input field, and a 'Login' button at the bottom.

NOTE: Your **OnviCord** administrator determines which levels of **OnviCord Web** you may access. Depending on your privileges, you may not have access to all areas of **OnviCord Web**. (Privileges are assigned in the Manager application.)

This help file covers the sections of **OnviCord Web** in the order they appear at the top of the **OnviCord Web** window after a successful login.

- [HOME](#)
- [RECENT RECORDINGS](#)
- [SEARCH](#)
- [REPORTS](#)
- [OUTBOX](#)
- [MANAGE](#) (depending on privileges; privileges are assigned in the Manager application)

An additional section, [EVALUATE](#), appears if your system is licensed for OnviCord's Quality Assurance Package.

A screenshot of the OnviCord Web interface. At the top is a navigation bar with links: Home, Recent Recordings, Search, Reports, Evaluate, Messages, Outbox, and Manage. To the right of these links are 'logout' and 'help' links. Below the navigation bar, on the left, is a welcome message: 'Welcome Administrator' and 'Logged IP: 172.20.1.87'. On the right, there are two dropdown menus: 'Dates:' with options 'Month / Day / Year' and '12 hour', and 'Name:' with options 'LastName' and 'FirstName'.

Password set June 8th, 2006

Names:

Personal settings

Photo: 

First name:

Last name:

Email:

Password:

Verify:

System statistics for June 13th, 2006

ALL RECORDINGS

Total recordings: 0
Total time: 00:00:00
Average length: 00:00:00

1 MINUTE OR LONGER

Total recordings: 0
Total time: 00:00:00
Average length: 00:00:00

RECORDING HISTORY

Played recordings: 0
Notes added: 0
Evaluations completed: 0
Files attached: 0
Color codes added: 0
Flags added: 0
Sent records: 0

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After successfully logging in, a Home page displays your name, the IP address of your machine, your [Personal Settings and Personal Statistics](#). (Admin users will see System Statistics reflecting all activity in the system.) The top of the page shows clickable links to other parts of **OnviCord Web**. Depending on your privileges, your headings may be different than the ones shown. (Privileges are assigned in the Manager application.)

[Home](#) [Recent Recordings](#) [Search](#) [Reports](#) [Evaluate](#) [Messages](#) [Outbox](#) [Manage](#) [logout](#) [help](#)

Welcome **Administrator**
Logged IP: 172.20.1.87
Password set June 8th, 2006

Dates:
Names:

Personal settings

Photo:

First name:

Last name:

Email:

Password:

Verify:

System statistics for June 13th, 2006

ALL RECORDINGS	RECORDING HISTORY
Total recordings: 0	Played recordings: 0
Total time: 00:00:00	Notes added: 0
Average length: 00:00:00	Evaluations completed: 0
1 MINUTE OR LONGER	Files attached: 0
Total recordings: 0	Color codes added: 0
Total time: 00:00:00	Flags added: 0
Average length: 00:00:00	Sent records: 0

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Personal Settings

The lower left corner of the Welcome screen contains a Personal Settings section that displays user existing name and e-mail information. To change your Personal Settings, enter the correct information and click *Update*.

The screenshot shows the OnviSource web application interface. At the top is a navigation bar with links: Home, Recent Recordings, Search, Reports, Evaluate, Messages, Outbox, Manage, logout, and help. Below this is a welcome message for 'Administrator' with logged IP 172.20.1.87 and password set date June 8th, 2006. To the right are dropdown menus for 'Dates' (Month / Day / Year, 12 hour) and 'Names' (LastName, FirstName). The 'Personal settings' section is highlighted with a red box and contains fields for Photo (with a 'Browse...' button and a camera icon), First name, Last name (filled with 'Administrator'), Email (filled with 'aprilboyd@sbcglobal.net'), Password, and Verify. Below these fields are 'Apply' and 'Cancel' buttons. To the right of the 'Personal settings' section is the 'System statistics for June 13th, 2006' section, which includes 'ALL RECORDINGS' and '1 MINUTE OR LONGER' statistics, and a 'RECORDING HISTORY' section. At the bottom right is the OnviSource logo and copyright information.

Home | Recent Recordings | Search | Reports | Evaluate | Messages | Outbox | Manage | logout | help

Welcome **Administrator**
Logged IP: 172.20.1.87
Password set June 8th, 2006

Dates: Month / Day / Year 12 hour
Names: LastName, FirstName

Personal settings

Photo: Browse...

First name:

Last name: Administrator

Email: aprilboyd@sbcglobal.net

Password:

Verify:

Apply Cancel

System statistics for June 13th, 2006

ALL RECORDINGS
Total recordings: 0
Total time: 00:00:00
Average length: 00:00:00

1 MINUTE OR LONGER
Total recordings: 0
Total time: 00:00:00
Average length: 00:00:00

RECORDING HISTORY
Played recordings: 0
Notes added: 0
Evaluations completed: 0
Files attached: 0
Color codes added: 0
Flags added: 0
Sent records: 0

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Photo

If no photo has been uploaded to represent you (optional), the camera icon is gray. To upload a photo, click Browse. When the Choose File box opens, find a suitable image on your computer and click *Open*. The image (maximum 200 x 200 pixels) must be a JPG, BMP, GIF or similar image type file. After an image is successfully uploaded, the camera icon turns blue. Click the camera to view your image. Click the X on the image to delete it.

This screenshot shows the 'Personal settings' form. A mouse cursor is pointing at the 'Browse...' button next to the 'Photo' field. The other fields are filled with: First name: Rita, Last name: Hess, Email: ritah@dayacord.com, Password: (empty), and Verify: (empty). The 'Apply' and 'Cancel' buttons are at the bottom.

Personal settings

Photo: Browse...

First name: Rita

Last name: Hess

Email: ritah@dayacord.com

Password:

Verify:

Apply Cancel

Name

In the personal settings area, authorized users can modify their first or last name, e-mail address (optional), and password. E-mail addresses can be up to 50 characters long and a user *must* enter an e-mail address to send e-mails. Re-enter the password to verify it is correct. When changing passwords, the new one must be different than the old one. Press Apply to enter the information or Cancel if you change your mind.

This is a partial screenshot of the 'Personal settings' form, showing the 'Photo' field with the 'Browse...' button and the camera icon.

Personal settings

Photo: Browse...

First name:

Last name:

Email:

Password:

Verify:

Date/Time/User Format

Use the drop-down boxes in the upper right corner of your HOME page to change the way dates, times, and user names appear in **OnviCord Web**.

Date options include: Day/Month/Year, Month/Day/Year, and Year/Month/Day. Choose a 12- or 24-hour time format, and choose whether to view users by last name shown first, first name shown first, or by login ID. Your selection here determines how users are shown in all sections of **OnviCord Web**.

Dates:

Names:

Logout/Help

Click the logout link at the top right of any **OnviCord Web** screen to exit the application and return to the Login page.

[logout](#) [help](#)

If you leave **OnviCord Web** unattended, you may be automatically logged out after a period of time (determined by your **OnviCord** administrator). Attempting any further operation will return you to the Login page. See your administrator if your sessions time out too quickly and you must frequently log in again.

Personal Statistics

Personal Statistics shown on the right side of the HOME page reflect the current day's activity. If you are the admin user, this will reflect all activity in the system.

System statistics for June 13th, 2006	
ALL RECORDINGS	RECORDING HISTORY
Total recordings: 0	Played recordings: 0
Total time: 00:00:00	Notes added: 0
Average length: 00:00:00	Evaluations completed: 0
1 MINUTE OR LONGER	Files attached: 0
Total recordings: 0	Color codes added: 0
Total time: 00:00:00	Flags added: 0
Average length: 00:00:00	Sent records: 0
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For information about other **OnviCord** products, click the corporate logo or use the e-mail link to contact a company representative.

RECENT RECORDINGS

Click **RECENT RECORDINGS** on the top of **OnviCord Web** page to display a list of recent recordings.

Home | **Recent Recordings** | Search | Reports | Evaluate | Messages | Outbox | [logout](#) | [help](#)

Recent options

Time: 24 hours
Records: Unlimited
Refresh: None

Default columns

Id: User name
First: Date
Second: Begin time
Third: Length

Display Reset

Users and channels

Jones, Bill

The first time you access **Recent Recordings**, you will be prompted to set preferences indicating what records to view and how they are displayed.

Recent options

Time: 1 week
Records: 10 records
Refresh: None

Default columns

Id: User name
First: Date
Second: Begin time
Third: Length

Display Reset

Users and channels

All users
Adams, Allen
Barnes, Stacia
Billings, Bob
Blackmann, Jessie
Brown, Lisa
Connors, Blake
Conrady, Cathy
Esposito, Maria
Feldman, Ron

[4]
[5]
[6]
[7]

HINT: Your Recent Recording preferences are stored for you, but you can change your preferences any time by clicking the Reset Recent Recording Options icon while on the Recent Recordings results page. 

In the Recent Options section, use the drop-down box to view recent recordings within a specific time frame (a range between five minutes

and one week) OR a fixed number of recent recordings (a range between 10 recordings to an unlimited maximum). *EXCEPTION* : You can not select the maximum for both fields (1 week and Unlimited).



Recent options

Time: 1 week

Records: 10 records

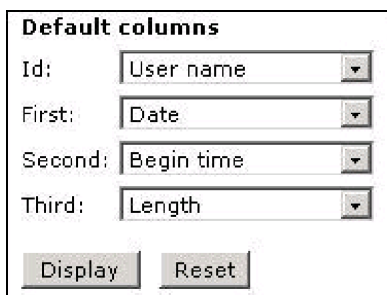
Refresh: None

If you choose recent recordings based on time (the first drop-down box), you can reorganize the columns of information when viewing the results. If you choose recent recordings based on the number of records (the second drop-down box), you can not reorganize the columns when viewing the results. (See [SEARCH RESULTS](#))

You can set the Recent Recordings results screen to automatically refresh by selecting a refresh rate. If you set a refresh rate and leave the Recent Recordings page open, **OnviCord Web** will update your results page at the specified interval. If you set a refresh rate but move to another page in **OnviCord Web** , the results page does not refresh. The default (None) does not automatically refresh the page.

On the first line of the Default Columns section, use the drop-down box to designate whether you want the user/channel identified by user name or by label. If your chosen method of identification does not exist, the next level of identification will be displayed. For example, if you choose to see the last 10 records and you select Label, the system will show the last 10 records regardless of whether the user's channel has a label.

Use the other drop-down boxes to specify what columns of information you want to see when viewing Recent Recordings. Defaults are recording date, begin time, and length.



Default columns

Id: User name

First: Date

Second: Begin time

Third: Length

Display Reset

In the Users and Channels section, select the user(s) and/or channel(s) you want displayed when you view RECENT RECORDINGS. To view multiple user(s) and/or channel(s), select the first user or channel you want to search, then hold down the CTRL key and select another. If you want to select multiple users or channels listed together, select the first one by clicking on it. Now hold down the SHIFT key and select the last in the series. Only users and channels you are authorized to view will be displayed. To unselect a user or channel, hold down the CTRL key and click on the one you want removed.



Users and channels

- All users
- Adams, Allen
- Barnes, Stacia
- Billings, Bob
- Blackmann, Jessie
- Brown, Lisa
- Connors, Blake
- Conrady, Cathy
- Esposito, Maria
- Feldman, Ron

[4]



Make your selections in RECENT RECORDINGS and click Display.

EXAMPLE: Linda is training 75 call center employees. She set her **RECENT RECORDINGS** to show the last 20 records at a refresh rate of every three minutes. By comparing the 20 most recent records (calls) every three minutes, she can immediately see how many minutes each trainee remains on the phone with each customer. Linda can quickly spot calls that last longer than usual and flag them for later review.

Even though she is working on a quarterly report in another program, Linda can leave **OnviCord Web** running in the background and minimize the **RECENT RECORDINGS** page. It will automatically refresh every three (3) minutes. Alternately, she can select a refresh rate of None and simply click *Recent Recordings* occasionally to manually refresh her results screen.

The [results screen](#) for RECENT RECORDINGS is much the same as the results screen for a detailed SEARCH. The next section explains how to enter specific search parameters or you may jump to the [SEARCH RESULTS](#) section.

The four Default columns in Recent Recordings (user name, recording date, begin time and length) will revert back to those defaults when you click the Reset Recent Recording Options icon on the [SEARCH RESULTS](#) page.

However, your Recent Options and Users/Channels information will always be whatever setting(s) you chose the last time you accessed Recent Recordings.



IMPORTANT NOTE: When access to a user or channel is removed, ALL recent recording settings are lost. When a user is granted additional privileges or access to additional users, saved settings are left intact. (Privileges are assigned in the Manager application.)

SEARCH

To find specific recordings, click **SEARCH** at the top of an **OnviCord Web** page. This search engine allows you to conduct a very broad search or an extremely focused search depending on the criteria you select. After selecting all options on this page that are most appropriate for your search, click the *Search* button in the lower left corner. *Reset* returns all search options to the default.

Home | Recent Recordings | **Search** | Reports | Evaluate | Messages | Outbox | Manage | logout | help

Recording range
Beginning October 6th, 2005
Ending December 16th, 2005

Recording
Begin: Jan 31 2006
Time: 12 00 AM
End: Jan 31 2006
Time: 11 59 PM

Users and channels
All users
Adams, Allen
Barnes, Stacia
Billings, Bob
Blackmann, Jessie
Type user...
All channels
April
Daniel
Rita

Default columns
Id: User name
First: Date
Second: Begin time
Third: Length

Detailed information
Display:
Number:
Dialed:
Notes:
Tracking:
Account:

Groups
Blue Team
Green Team

Length of recording
Hrs Mins Secs
Minimum: 00 00 00
Maximum: 00 00 00

Settings
Account added
Attachment added
Bookmark added
Color [Answering machine - Blue]
Color [Call after 5:00 PM CST - Bro
Color [Customer call back - Yellow]
Color [Hot lead - Red]
Color disabled [Black]
Color disabled [Cyan]
All users
Administrator
Adams, Allen
Barnes, Stacia

Custom field information
Call Type
Call Type - New customer
Call Type - Existing customer
Call Type - Transfer
Cross sell opportunity

The following sections explain how to enter your search criteria:

[Recording Range](#)

[Users and Channels](#)

[Default Columns](#)

[Detailed Information](#)

[Groups](#)

[Length](#)

[Settings](#)

[Custom Field Information](#)

Recording Range

On the left side of the Search page are sections for choosing the recording range and [users/channels](#).

Select the date(s) that recording(s) were made.

Use the small icons to the right of the Recording Range for quick access to recordings for last **month** (calendar showing entire month purple), last **week** (calendar showing one week red), or **yesterday** (calendar showing one day green).

To the right of the recording range shortcuts are two additional icons, one to save search criteria (configurable by user) and one allowing you to load your previous search criteria.

If you want to repeat a search multiple times using nearly all of the same search parameters, enter all search criteria on this page, then click the icon. Enter a title for this search in the popup box and click *Save*.

To load all search criteria from a previously named search (see previous step), click the last icon and select *Last search* in the Saved Searches box. This inserts all parameters used on your most recent search.

Additionally, you can load a Saved Search (or Last Search) and then change any of the criteria. For example, you searched for recordings that were at least one minute long and saved the search as **Length 1 min +**. Later you can select **Length 1 min +** from the Saved Search list and change the search criteria to less than one minute. Press the Search button to find recordings that were less than one minute long. (**NOTE:** When you load a Saved Search, you are given the option of also loading the saved Begin and End date/time range or using the default date/time range.)

Any item on the Saved Search list can be deleted by clicking the [x] beside the name of the saved search.

Users and Channels

Recording range Beginning October 6th, 2005 Ending December 16th, 2005 Recording ☐ date/time range Begin: May 1 2005 Time: 12 00 AM End: Jan 16 2006 Time: 03 35 PM Users and channels All users Adams, Allen Barnes, Stacia Billings, Bob Blackmann, Jessie Type user... [4] [5] [6] [7] Search Reset	Default columns Id: User name First: Date Second: Begin time Third: Length Detailed information Display: Number: Dialed: Notes: Tracking: Account: Groups Blue Team Green Team	Length of recording Hrs Mins Minimum: 00 00 Maximum: 00 00 Settings Account added Attachment added Bookmark added Color disabled [Answering] Color disabled [Black] Color disabled [Call after] Color disabled [Customer] Color disabled [Cyan] Color disabled [Gold] All users Administrator Adams, Allen Barnes, Stacia Custom field information Call Type Call Type - New customer Call Type - Existing customer Cross sell opportunity
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Users and Channels defaults to all users and channels you are authorized to view, or you can click an individual user or channel to select it instead. Existing users are listed first, then inactive users/channels are shown with an (x) and the user/channel name, followed by User Unknown. (User Unknown searches for all recordings that are not associated with a user regardless of the channel where the recording was made.) Labeled channels are shown alphabetically, then channels not labeled (numerically).

Users and channels

All users
Adams, Allen
Barnes, Stacia
Billings, Bob
Blackmann, Jessie

Type user...

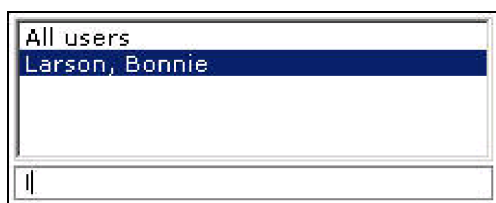
[4]
[5]
[6]
[7]

Search Reset

To search multiple users or channels, select the first one you want to search, then hold down the CTRL key and select another. If you want to select multiple users or channels listed together, select the first one in the series. Now hold down the SHIFT key and select the last in the series. You can unselect a user or channel by holding down the CTRL key and clicking on the one you want removed from the search.

Click Search to begin searching without setting more parameters, or click Reset to change all fields back to the default settings.

HINT : If you don't want to scroll through the entire list of users, enter the user's name **OR** just the first letter of the user's first name (or last name if applicable) in the empty box below the list of users. This takes you to the group of users who share that letter.



Example: If you are configured to see last name first, type the letter **L** in the box to go immediately to all users whose last name begins with the letter L.

To search recordings based on "groups" of users, read [Groups to Search](#) .

HINT : Can't think of an agent's name but would recognize him/her? Click on a user name to see the person's uploaded photo (if one exists) for 3 seconds.

Users and channels

Hickman, Glenda

Hooper, Max

Jacobs, John

Johnson, Mark

Larson, Bonnie

Type user...

All channels

April

Daniel

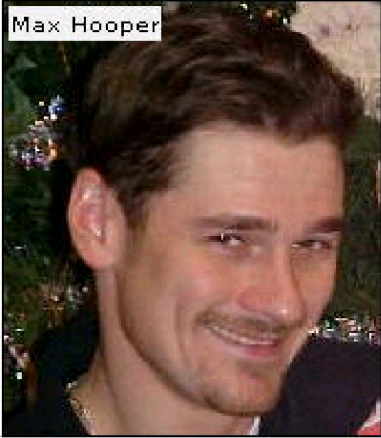
Rita

Search

Reset

Number:

Max Hooper



Default Columns

The center section of the Search page allows you to add additional search criteria and define how you want the search results displayed.

Recording range
Beginning October 6th, 2005
Ending December 16th, 2005

Recording date/time range
Begin: Jan 16 2006
Time: 12 00 AM
End: Jan 16 2006
Time: 11 59 PM

Users and channels
All users
Adams, Allen
Barnes, Stacia
Billings, Bob
Blackmann, Jessie
Type user...
[4]
[5]
[6]
[7]

Search **Reset**

Default columns
Id: User name
First: Date
Second: Begin time
Third: Length

Detailed information
Display:
Number:
Dialed:
Notes: ?
Tracking:
Account:

Groups
Blue Team
Green Team

Length of recording
Hrs Mins Secs
Minimum: 00 00 00
Maximum: 00 00 00

Settings
Account added
Attachment added
Bookmark added
Color disabled [Answering machine]
Color disabled [Black]
Color disabled [Call after 5:00 PM]
Color disabled [Customer call back]
Color disabled [Cyan]
Color disabled [Gold]

Custom field information
Call Type
Call Type - New customer
Call Type - Existing customer
Cross sell opportunity

There are four default columns.

Default columns
Id: User name
First: Date
Second: Begin time
Third: Length

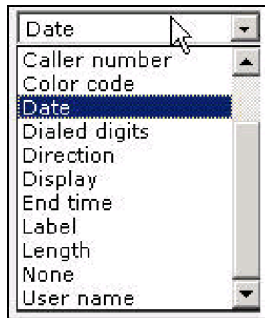
These four fields determine how your [search results](#) display.

Results 1-12 of 23. Toolbox...

	Id	Date	Begin	Length	
☐	Hess, Rita	12/16/05	01:10:42 PM	00:01:21	
☐	Hess, Rita	12/16/05	01:10:08 PM	00:00:05	
☐	Hess, Rita	12/16/05	09:33:11 AM	00:00:08	
☐	Hess, Rita	12/14/05	04:10:40 PM	00:00:11	
☐	Hess, Rita	12/14/05	02:55:30 PM	00:00:14	
☐	Hess, Rita	12/12/05	11:13:10 AM	00:01:01	
☐	Hess, Rita	12/12/05	11:06:41 AM	00:00:08	
☐	Hess, Rita	12/12/05	11:05:46 AM	00:00:07	

☐	Hess, Rita	12/12/05	11:05:09 AM	00:00:10			
☐	Hess, Rita	12/12/05	11:04:02 AM	00:00:24			
☐	Hess, Rita	12/12/05	10:45:00 AM	00:00:06			
☐	Hess, Rita	12/12/05	10:44:38 AM	00:00:17			

ID can be User Name or Label. The next three columns (First, Second, Third) default to Date, Begin Time, and Length. Other available columns from the drop-downs are: Account, Begin Time, Call Type, Caller Number, Color Code, Dialed Digits, Direction, Display, End Time, Label, Length, None, and User Name. If you create [Custom Fields](#), those fields are also available as column choices.



Your choices (which columns to display and the order in which they are shown) are stored so you don't have to reset them each time you perform a new search.

To interpret the results of a search, see the [SEARCH RESULTS](#) section.

Detailed Information

Recording range Beginning October 6th, 2005 Ending December 16th, 2005 Recording date/time range Begin: Jan 16 2006 Time: 12 00 AM End: Jan 16 2006 Time: 11 59 PM Users and channels All users Adams, Allen Barnes, Stacia Billings, Bob Blackmann, Jessie Type user... [4] [5] [6] [7] Search Reset	Default columns Id: User name First: Date Second: Begin time Third: Length Detailed information Display: Number: Dialed: Notes: ? Tracking: Account: Groups Blue Team Green Team	Length of recording Hrs Mins S Minimum: 00 00 Maximum: 00 00 Settings Account added Attachment added Bookmark added Color disabled [Answering r Color disabled [Black] Color disabled [Call after 5 Color disabled [Customer c Color disabled [Cyan] Color disabled [Gold] All users Administrator Adams, Allen Barnes, Stacia Custom field information Call Type Call Type - New customer Call Type - Existing custom Cross sell opportunity
--	---	--

This optional section enables you to fine-tune your search criteria by typing information into any combination of fields.

Detailed information	
Display:	
Number:	
Dialed:	
Notes:	?
Tracking:	
Account:	▼

Display is the party's name as displayed on Caller ID OR as displayed on a digital phone display screen.

Number is the calling party's phone number. (For T1/E1 channels, number is the calling party's number on PRI only).

Dialed is the called party's number.



NOTE: In the Number and Dialed fields, you can use an underscore symbol (_) to signify unknown digits. For example, to find all calls you made to area code 405 with a 237 prefix, use the Dialed field. Type in 405 237 _ _ _ _ (four underscores, one for each digit). This feature can be used with/without using the % sign described below.

To perform a wildcard search in the Display, Number, Dialed or Account fields, use a leading and/or trailing percent sign (%). Using a % sign before the data will return any recording(s) with that data regardless of what is before it. A % sign after the data will return any recording(s) with that data regardless of what is after it. (Unlike other search engines, % is used as a wildcard instead of * since an asterisk can be used as actual search criteria because it can appear on a phone's display.)

A keyword in the **Notes** box includes a search for text in Notes associated with the recording(s) and also searches free form text in Custom Fields. A plus sign [+] in front of the word(s) indicates the word(s) must be present in any note found. A minus sign [-] in front of word(s) indicates the word(s) must not be present in any note found. (In either case, separate each word using the space bar). An asterisk [*] appended to a word indicates a word that must be partially present in any note found. A phrase enclosed in quotes [" "] indicates a complete phrase that must be present in any note found.

Entering a *Tracking* number limits the search to only the recording with that tracking number. Searching for a tracking number ignores all other search criteria in the Detailed Information section. Tracking numbers must match exactly.

[Account](#) information is configured by the user and is used to locate only recordings with specific account information. If your administrator has the Accounts list ON, use the drop-down box to select the appropriate account information. With the Accounts list turned OFF, you must enter the account information on the Account line. (**Administrators:** see how to turn account on/off in the [Options](#) section. See how to add accounts in the **Manager** application.)

EXAMPLE 1: Joe makes an outbound call on T1 PRI channel 1. When performing a search, he finds the call. It is marked as outbound. The main line number (580-249-9941) appears in the number field. The number dialed (918-553-0112) appears in the dialed field.

Later, Joe receives a DID (direct inbound dial) from the person he called earlier. The call comes in on T1 PRI channel 1. When performing a search, he finds the call. It is marked as inbound. The calling party's number (918-553-0112) appears in the number field and Joe's DID number (580-249-9327) appears in the dialed field.

EXAMPLE 2: Mary needs to find a call Bill made to an Oklahoma City customer during July. Searching all calls he made that month may yield hundreds of results. By adding 405% (the Oklahoma City area code) to the Dialed box, the search results will include only calls he made that contain that string of numbers. (In this case, if you must dial a 9 to get an outside line, enter a 9 first OR enter %405%.)

EXAMPLE 3: Bill is certain he made a Note (see Notes) while on the phone to the Oklahoma City customer about her need for term life insurance. Mary can further refine her search by typing term in the notes box. Her search results will show only July calls that Bill dialed to customers whose telephone number includes 405 AND that have a Note attached that contains the word term.

A semicolon (;) means and/or in a search. For example, enter 580%;405% in the dialed field to search for calls made to area codes 580 and/or 405 (or assumes one exists but not the other). The semicolon can be used with the other search characters.

Groups

Recording range Beginning October 6th, 2005 Ending December 16th, 2005 Recording ☐ date/time range Begin: Jan 16 2006 Time: 12 00 AM End: Jan 16 2006 Time: 11 59 PM Users and channels All users Adams, Allen Barnes, Stacia Billings, Bob Blackmann, Jessie Type user... [4] [5] [6] [7] Search Reset	Default columns Id: User name First: Date Second: Begin time Third: Length Detailed information Display: Number: Dialed: Notes: ? Tracking: Account: Groups Blue Team Green Team	Length of recording Hrs Mins Secs Minimum: 00 00 00 Maximum: 00 00 00 Settings Account added Attachment added Bookmark added Color disabled [Answering machine] Color disabled [Black] Color disabled [Call after 5:00 PM c Color disabled [Customer call back Color disabled [Cyan] Color disabled [Gold] All users Administrator Adams, Allen Barnes, Stacia Custom field information Call Type Call Type - New customer Call Type - Existing customer Cross sell opportunity
---	---	--

Select one or more Groups to quickly search for calls made by multiple users within that group. (Your administrator controls who has access to each group.)

Groups Blue Team Green Team
--

Click a group name to select it. To search multiple groups for which you have privileges, select the first group to include in the search, then hold down the CTRL key and select another. If you want to select multiple groups listed together, select the first one. Now hold down the SHIFT key and select the last in the series. You can unselect a group by holding down the CTRL key and clicking on the group you want removed. (Privileges are assigned in the Manager application.)

Only groups you are authorized to view will be displayed. To search for recordings made by only certain users and/or channels within a group, see [Users and Channels to Search](#).

Length

Additional, optional search criteria is shown on the right side of the Search page.

The screenshot shows a web application interface for searching recordings. It is divided into several sections:

- Recording range:** Includes date pickers for 'Beginning' (October 6th, 2005) and 'Ending' (December 16th, 2005).
- Recording date/time range:** Includes pickers for 'Begin' (May 1, 2005, 12:00 AM) and 'End' (Jan 16, 2006, 03:35 PM).
- Users and channels:** A list box showing 'All users' and a scrollable list of names: Adams, Allen; Barnes, Stacia; Billings, Bob; Blackmann, Jessie.
- Default columns:** A section with dropdowns for 'Id' (User name), 'First' (Date), 'Second' (Begin time), and 'Third' (Length).
- Detailed information:** A section with input fields for 'Display', 'Number', 'Dialed', 'Notes', 'Tracking', and 'Account'.
- Groups:** A list box showing 'Blue Team' and 'Green Team'.
- Length of recording (highlighted in red):** Contains:
 - Minimum:** Hrs (00), Mins (00), Secs (00)
 - Maximum:** Hrs (00), Mins (00), Secs (00)
 - Settings:** A list of recording types with checkboxes: Account added, Attachment added, Bookmark added, Color disabled [Answering machine], Color disabled [Black], Color disabled [Call after 5:00 PM], Color disabled [Customer call back], Color disabled [Cyan], Color disabled [Gold].
 - Custom field information:** A list of custom fields: Call Type, Call Type - New customer, Call Type - Existing customer, Cross sell opportunity.

A minimum and maximum recording length can be designated in hours, minutes and seconds. Recording length defaults are set to zero, meaning any length recording will be included in the search. Setting a minimum length finds recordings that are equal to or longer than the minimum you set. Setting a maximum length finds recordings that are equal to or shorter than the maximum you set.

This is a close-up of the 'Length of recording' section. It shows two rows of pickers for 'Hrs', 'Mins', and 'Secs'. The 'Minimum' row has values 00, 01, and 00. The 'Maximum' row has values 00, 02, and 00. A mouse cursor is pointing at the 'Secs' picker in the 'Minimum' row.

Settings

Recording range Beginning October 6th, 2005 Ending December 16th, 2005 Recording ☐ date/time range Begin: May 1 2005 Time: 12 00 AM End: Jan 16 2006 Time: 03 35 PM Users and channels All users Adams, Allen Barnes, Stacia Billings, Bob Blackmann, Jessie Type user... [4] [5] [6] [7] Search Reset	Default columns Id: User name First: Date Second: Begin time Third: Length Detailed information Display: Number: Dialed: Notes: Tracking: Account: Groups Blue Team Green Team	Length of recording Hrs Mins Secs Minimum: 00 00 00 Maximum: 00 00 00 Settings Account added Attachment added Bookmark added Color disabled [Answering machine] Color disabled [Black] Color disabled [Call after 5:00 PM] Color disabled [Customer call back] Color disabled [Cyan] Color disabled [Gold] All users Administrator Adams, Allen Barnes, Stacia Custom field information Call Type Call Type - New customer Call Type - Existing customer Cross sell opportunity
--	---	--

You can limit a search based on *settings* (described below) **and** by a particular user or users (optional). Choosing a user or users from the second list limits your search to only recordings that match your selection in Settings if performed by the user(s) you choose.

For example, to find all recordings that have been PLAYED, select *Played* from the first list. But to find all recordings PLAYED by STACIA BARNES, choose *Played* from the first list and choose *Stacia Barnes* from the second list.

Only users you have access to are shown, and any number of settings may be selected.

Settings Listed in Outbox Not color coded Not evaluated Not evaluated [Customer Retention] Not played Not sent Note added Played Recording [Audio] Administrator Adams, Allen Barnes, Stacia Billings, Bob
--



IMPORTANT NOTE: When you choose an action from the Settings list (Played, Evaluated, Sent, etc.), the drop-down arrow beside the [Recording Date and Time Range](#) becomes active. This allows you to search based on when the actual recording was made **OR** when the action was taken.

Following the example above, Dan wants to find recordings that Stacia Barnes **played** during the month of June. In the Settings section, he selects Played in the first box and Stacia Barnes in the second box. He then returns to the first column on the Search page ([Recording Date and Time Range](#)) and uses the drop-down arrow to select Played.



Dan's search results will show only recordings that Stacia Barnes played during the month of June *regardless of when the recordings were made* .

Custom Field Information

Recording range Beginning October 6th, 2005 Ending December 16th, 2005 Recording ☐ date/time range Begin: May 1 2005 Time: 12 00 AM End: Jan 16 2006 Time: 03 35 PM Users and channels All users Adams, Allen Barnes, Stacia Billings, Bob Blackmann, Jessie Type user... [4] [5] [6] [7] Search Reset	Default columns Id: User name First: Date Second: Begin time Third: Length Detailed information Display: Number: Dialed: Notes: Tracking: Account: Groups Blue Team Green Team	Length of recording Hrs Mins Secs Minimum: 00 00 00 Maximum: 00 00 00 Settings Account added Attachment added Bookmark added Color disabled [Answering machine] Color disabled [Black] Color disabled [Call after 5:00 PM] Color disabled [Customer call back] Color disabled [Cyan] Color disabled [Gold] All users Administrator Adams, Allen Barnes, Stacia Custom field information Call Type Call Type - New customer Call Type - Existing customer Cross sell opportunity
--	---	--

Many user-defined fields can be associated with recordings once configured by a system administrator. (Read more about this feature under [MANAGE Custom Fields](#).) Choosing an item from this list returns only recordings with at least one of the custom selections attached to the recording.

To search for recordings associated with a custom field, select it from the list. To search for multiple custom fields, select the first one you want to search for, then hold down the CTRL key and select another. To search for multiple items listed together, select the first one, then hold down the SHIFT key and select the last in the series. Unselect any item by holding down the CTRL key and clicking on the one you want removed.

Custom field information Call Type Call Type - New customer Call Type - Existing customer Call Type - Transfer Cross sell opportunity

EXAMPLE: One call center pays a bonus based on the number of successful calls made to new customers. To determine how many calls fit that criteria during a month, the team leader does a search for recordings where the Call Type = New Customer.

After selecting all options on this page that are appropriate for your search, click the Search button in the lower left corner. Reset returns all search options to the default.

Viewing Search Results

If results are found when you click [Search](#) or when you select [RECENT RECORDINGS](#), a search results page shows a list of recordings on the left. The [playback controller](#) below the search results is dimmed and unavailable. [Details](#) about the first call on the page (which is highlighted) are shown on the right. At the top of the list is a summary of your results. *Displaying 1-12 of 358 matches* means you are seeing the first 358 matches and there are more on the following pages.

Results **1-12 of 358.**

Toolbox...

	Id	Date	Begin	Length			
☒	Hess, Rita	01/16/06	02:05:40 PM	00:00:52			
☐	Hess, Rita	01/16/06	12:54:23 PM	00:00:08			
☐	Hess, Rita	01/16/06	12:31:42 PM	00:00:07			
☐	Hess, Rita	01/13/06	04:43:38 PM	00:00:07			
☐	Hess, Rita	01/13/06	01:02:33 PM	00:01:01			
☐	Hess, Rita	01/13/06	09:32:43 AM	00:03:33			
☐	Hess, Rita	01/13/06	08:44:12 AM	00:00:08			
☐	Hess, Rita	01/12/06	12:52:49 PM	00:00:19			
☐	Hess, Rita	01/12/06	12:52:35 PM	00:00:11			
☐	Hess, Rita	01/12/06	12:34:48 PM	00:00:08			
☐	Hess, Rita	01/12/06	11:28:23 AM	00:00:08			
☐	Hess, Rita	01/12/06	11:14:56 AM	00:01:23			

[jump]

12 results

[previous] [next]

DETAILSNOTES**EVALUATION**

Hess, Rita

Date: January 16, 2006
Time: 2:05:40 PM
Length: 00:00:52
Direction: Inbound
Label: x1147

Display: ANSWER Kim Schneider CALLED ID
Number:
Dialed:
Track #: Add tracking number
Account:

UpdateSaveDelete

Recording history

01/17/06 - Hess R [Played]
01/17/06 - Hess R [Played]
01/16/06 - Hess R [Recording]

When viewing [RECENT RECORDINGS](#) or Search Results, you can quickly move to the previous page or next page of results using the tool bar below the search results window. To narrow your search for a specific recording or range of recordings, type a number in the box and click [jump].

Use the drop-down box to select the number of results per page displayed. For example, if your search returns 2000 matches and you type 1000 in the jump box, the page that contains match number 1000 is displayed. Quickly jumping through results is useful when you want to see a specific group from within a large number of results.

[jump]

12 results

[previous] [next]

If unable to locate a specific recording or group of recordings, try narrowing your [SEARCH](#) criteria.

Icons

Each recording on the search results or recent recordings results page has multiple other icons associated with it.

	ID	Date	Begin ▼	Length	
☐	Hess, Rita	01/17/06	10:57:23 AM	00:00:07	  
☐	Hess, Rita	01/17/06	10:48:40 AM	00:00:06	  
☐	Hess, Rita	01/16/06	02:05:40 PM	00:00:52	  
☐	Hess, Rita	01/16/06	12:54:23 PM	00:00:08	  
☐	Hess, Rita	01/16/06	12:31:42 PM	00:00:07	  

Color Codes and Flags

At the far left of each row is a Color Code/Flag indicator box. Color codes are defined and enabled by a system administrator to denote something (item, event, outcome, etc.) about a recording. A flag is generally added to a recording to make it easier to locate later during a search.

ID	Date	Begin ▾	Length	
☐ Hess, Rita	01/17/06	10:57:23 AM	00:00:07	  
☐ Hess, Rita	01/17/06	10:48:40 AM	00:00:06	  
☐ Hess, Rita	01/16/06	02:05:40 PM	00:00:52	  
☐ Hess, Rita	01/16/06	12:54:23 PM	00:00:08	  
☐ Hess, Rita	01/16/06	12:31:42 PM	00:00:07	  

To add a flag or color code to a recording, click the box to the left of the recording. This opens a series of boxes to choose from. Hold your cursor over a color code to see the meaning of the color code, then click one of the boxes to make your selection. If a recording is color coded **and** you have access to the user who applied the color code, you will see that user's name when you hold your cursor over the icon.

☐	Hess, Rita	01/16/06	02:05:40 PM	00:00:52			
☒	☐	☐	☐	☐	☐	☐	☐
☐	Hess, Rita	01/16/06	12:31:42 PM	00:00:07			

A box that contains a checkmark indicates the call is flagged. If a recording is flagged **and** you have access to the user who flagged it, you will see that user's name when you hold your cursor over the icon, but you will *see a flag in the box* **only** if **you** actually flagged that recording. (Multiple users can color code and/or flag the same recording.) To determine when a color code or flag was added, refer to the [Recording History](#).

Recordings can be flagged on the [Recent Recordings](#) results page or after performing a [search](#). Calls can also be flagged while the recording is in progress in **OnviCord Agent** or **OnviCord Monitor**. A call can also be flagged after the recording has ceased **if no subsequent recording has started**.

A flagged and/or color coded recording is much easier to find during a search if selected as part of the search criteria in Search [Settings](#).

QUESTION: What if a color code is changed to mean something different than when I applied it to a recording?

ANSWER: The color code will be the one in use *when the color code was set*. For example, in November you color code a call RED. In December, the meaning of the red color code was changed to mean something else. If you later search for and find the November recording, it will appear in your search results with a RED color code *signifying the November meaning*.

Play

There are multiple icons for each recording. The first icon indicates the type of recording (headphones for audio only or a computer monitor for audio/video combination). The second icon (a bar code symbol) represents details about the recording, and the third (an envelope) enables you to e-mail details about the recording and/or the actual recording.



To the right of each recording, click the first icon (headphones for audio only or a computer monitor for audio/video combination) to **play** the recording. You can control the playback using the [Playback Controller](#). When listening to the "life of a recording" (available only with CTI), you only have access to the segment of the call made by users/channels you have access to.





NOTE: The play icon is **only** available if the recording is presently stored on the server.



A dimmed icon with a red X indicates the recording is no longer on the server and may have been purged. Check with your system administrator to see if the recording can be recovered from your backup media. The send icon may be available even if the recording is not stored on the server, since you can still e-mail the call details minus the actual recording.



A headphones icon with a tiny padlock in the upper right corner indicates the recording is *encrypted* on the server.

IMPORTANT NOTE: Recordings are NOT encrypted during the transmission from your server to your computer. If you require this level of protection, contact your system administrator about setting up a Secure Sockets Layer (SSL), a protocol for secure network communications. Instructions for establishing a Secure Sockets Layer are described in the System Setup Guide that accompanied your shipment.



If the first icon appears with a clock, it means the selected recording is slated for a scheduled transfer into the data server at a later time. (Scheduled transfers are configured by your system administrator in **OnViews**.) To immediately force the transfer of the recording into the database so that it can be played, press the headphones icon, then press F5 to refresh your screen.

Details

Click the middle icon to display **details** about this recording (shown on the right half of the screen). [Details](#) are covered more thoroughly later in this section.



Click the last icon to **e-mail** the recording (or the recording details). You'll find detailed instructions on how to [E-mail a Recording](#) later in this section. While you can e-mail the details of an encrypted recording, the actual recording can **NOT** be sent.



Column Display

The columns shown on the Search Results page are based on your [Default Columns](#) choices on the Search page.

Results 1-25 of 25. Toolbox...

	<u>Id</u>	<u>Date</u>	<u>Begin</u> ▼	<u>Length</u>	
☐	Hess, Rita	01/18/06	09:02:15 AM	00:01:34	  
☐	Hess, Rita	01/17/06	04:51:41 PM	00:01:06	  

To change a column to display other available information, click the column title. For example, selecting the Date, Begin Time and Length columns displays those three information fields on the results page.

<u>Begin</u> ▼	Replace with
09:02:15	Account
	Color code
04:51:41	Date
	Dialed digits
04:26:20	Direction
	Display
02:25:36	End time
	Label
12:31:29	Length
	Number
10:57:23	User name
10:48:40 AM	00:00:06

However, when viewing Search Results (rather than Recent Recordings) clicking a column header opens a box where you can choose a different field of information **OR** sort the existing results by this column in either ascending or descending order. In ascending order, users are listed alphabetically, followed by labeled channels (alphabetically) and channels (numerically).

<u>Length</u>	Sort
00:01:00	Ascending ▲
	Descending ▼
	Replace with
00:01:40	Account
	Begin time
00:01:30	Color code
	Date
00:01:00	Dialed digits
	Direction
00:00:10	Display
	End time
00:00:00	Label
00:00:40	Number
	User name

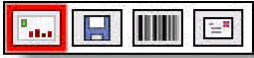
In the upper right corner of the [Playback Controller](#) area are four additional icons that pertain to the selected (highlighted) recording. When viewing search results or recent recordings, hold your mouse over an icon to learn its function or refer to the chart below.

Hess, Rita Bookmarks... +   

   Speed     

Jan 17, 2006 12:31:35 PM 46 KB 00:00:29

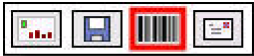
The first icon adds the selected recording to your personal [Play Bay](#) where recordings are stored for later playback. If this icon is gray, the recording is not in your Play Bay. If the icon is yellow, it is listed in your Play Bay.



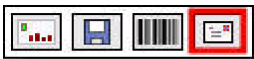
The second icon saves the recording to a disk. **IMPORTANT NOTE:** If a recording is encrypted, it is **not** encrypted when saved to your chosen location.



This icon provides [Details](#) for this recording like the one in Search Results, indicating whether at least one [Note](#), [Evaluation](#), and/or [Attachment](#) exists.



The last icon allows you to [E-mail a Recording](#) or the recording details. (While you can e-mail the details of an encrypted recording, the actual recording can **NOT** be sent.) If this icon is gray, the recording is not currently listed in your e-mail Outbox. If the icon is yellow, it is listed in your Outbox.



Toolbox

The upper right corner of the search results window contains a Toolbox drop-down box. Selections from the Toolbox allow you to take further action with some or all current search results. Each function is described in more detail in the sub-sections.

The screenshot displays a software interface for managing search results. On the left, a table lists 12 results (out of 73 total) for a search of 'Hess, Rita'. Each row includes checkboxes, the name, date, begin time, and length. To the right of the table is a 'Toolbox' menu with options: 'Export recordings', 'Export results', 'Delete this page', 'Launch Outbox', 'Launch Play bay', 'Play this page', 'Results as report', and 'Send this page'. Below the table are navigation controls including a '[jump]' field, a '12 results' dropdown, and '[previous]' and '[next]' buttons. At the bottom left is a media player with play, pause, and stop buttons. On the right side, there are tabs for 'DETAILS', 'NOTES', and 'EVALUATION'. The 'DETAILS' tab is active, showing information for 'Hess, Rita' including Date (January 18, 2006), Time (9:02:15 AM), Length (00:01:34), Direction (Inbound), and Label (x1147). Below this is a 'Display' field with the text 'ANSWER Tracy Hiland CALLED ID F'. Further down are input fields for 'Number:', 'Dialed:', 'Track #:' (with a hint 'Add tracking number'), and 'Account:'. At the bottom of the details section are 'Update', 'Save', and 'Delete' buttons. A 'Recording history' section at the very bottom shows a single entry: '01/18/06 - Hess R [Recording]'.

	Id	Date ▲	Begin	Length	
☐	Hess, Rita	01/03/06	09:32:40 AM	00:01:07	
☐	Hess, Rita	01/03/06	09:37:18 AM	00:00:54	
☐	Hess, Rita	01/03/06	09:38:26 AM	00:01:44	
☐	Hess, Rita	01/03/06	09:40:11 AM	00:01:31	
☐	Hess, Rita	01/03/06	09:41:42 AM	00:01:03	
☐	Hess, Rita	01/03/06	09:42:45 AM	00:00:14	
☐	Hess, Rita	01/03/06	09:44:11 AM	00:00:08	
☐	Hess, Rita	01/03/06	11:09:45 AM	00:00:40	
☐	Hess, Rita	01/03/06	12:35:27 PM	00:00:10	
☐	Hess, Rita	01/03/06	01:01:41 PM	00:00:09	
☐	Hess, Rita	01/03/06	03:51:10 PM	00:00:09	
☐	Hess, Rita	01/04/06	08:22:46 AM	00:06:18	

Results 1-12 of 73.

[jump] 12 results [previous] [next]

01/18/06 - Hess R [Recording]

Export Audio

(This option not shown below.)

The screenshot shows a web application interface. On the left, there is a table titled "Results 1-12 of 73." with columns: Id, Date, Begin, and Length. The table lists 12 recordings for "Hess, Rita" from 01/03/06 to 01/04/06. To the right of the table is a "Toolbox..." dropdown menu with a red box highlighting it. The dropdown menu is open, showing options: "Export recordings", "Export results", "Delete this page", "Launch Outbox", "Launch Play bay", "Play this page", "Results as report", and "Send this page". Below the table are controls for "[jump]", "12 results" (with a dropdown arrow), "[previous]", and "[next]". At the bottom left is a media player with play, pause, and stop buttons. On the right side of the interface, there are tabs for "DETAILS", "NOTES", and "EVALUATION". The "DETAILS" tab is active, showing information for "Hess, Rita": Date: January 18, 2006; Time: 9:02:15 AM; Length: 00:01:34; Direction: Inbound; Label: x1147. Below this are input fields for "Display:", "Number:", "Dialed:", "Track #:" (with a placeholder "Add tracking number"), and "Account:". At the bottom of the details section are buttons for "Update", "Save", and "Delete". Below the details section is a "Recording history" section showing "01/18/06 - Hess R [Recording]".

Id	Date	Begin	Length
☐ Hess, Rita	01/03/06	09:32:40 AM	00:01:07
☐ Hess, Rita	01/03/06	09:37:18 AM	00:00:54
☐ Hess, Rita	01/03/06	09:38:26 AM	00:01:44
☐ Hess, Rita	01/03/06	09:40:11 AM	00:01:31
☐ Hess, Rita	01/03/06	09:41:42 AM	00:01:03
☐ Hess, Rita	01/03/06	09:42:45 AM	00:00:14
☐ Hess, Rita	01/03/06	09:44:11 AM	00:00:08
☐ Hess, Rita	01/03/06	11:09:45 AM	00:00:40
☐ Hess, Rita	01/03/06	12:35:27 PM	00:00:10
☐ Hess, Rita	01/03/06	01:01:41 PM	00:00:09
☐ Hess, Rita	01/03/06	03:51:10 PM	00:00:09
☐ Hess, Rita	01/04/06	08:22:46 AM	00:06:18

[jump] 12 results [previous] [next]

Media player controls: Play, Pause, Stop, and progress bar.

DETAILS NOTES EVALUATION

Hess, Rita

Date: January 18, 2006
Time: 9:02:15 AM
Length: 00:01:34
Direction: Inbound
Label: x1147

Display: ANSWER Tracy Hiland CAL
Number:
Dialed:
Track #: Add tracking number
Account:

Update Save Delete

Recording history

01/18/06 - Hess R [Recording]

This option allows users with screen capture to export only the audio portion of recordings. When selected, a confirmation screen appears displaying the number of recordings being exported and a progress bar indicates the percentage complete. Depending on the number and size of recordings exported, it may take several minutes to complete the operation. When asked whether to open the file or save it to your computer, choose Save. Select the target location and file name. Click Save.

Follow the directions applicable to your system for saving and opening zipped files. The (audio) recordings are exported as **.wav** files. Using the most common software for zipping and unzipping files, listen to the recordings by double-clicking the one you want to hear. To export recordings, a user must have the Save and Send privilege. (Privileges are assigned in the Manager application.)

WindowsXP users:

When attempting an export, WindowsXP users may see a popup message explaining the Information Bar. Check the box if you do not want to see the message again and click OK. Click on the XP Information Bar that appears and select Download File. You must then return to the Toolbox drop-down and select the desired export function again (audio, recordings or results).

To avoid repeating this procedure each time, launch Internet Explorer. From the menu bar, select Tools, Internet Options. On the Security tab, select Custom Level. Scroll to Downloads. Enable Automatic prompting for file downloads. Click OK. When asked if you are sure, click Yes.



sent.

Export Recordings

When you choose to export recordings from the toolbox in [RECENT RECORDINGS](#) or [SEARCH](#) results, a confirmation screen appears displaying the number of recordings being exported and a progress bar indicates the percentage complete. Depending on the number and size of recordings exported, it may take several minutes to complete the operation. When asked whether to open the file or save it to your computer, choose Save. Select the target location and file name. Click Save.

The screenshot displays the 'RECENT RECORDINGS' interface. At the top, it shows 'Results 1-12 of 73.' Below this is a table with columns: Id, Date, Begin, and Length. The table lists 12 recordings for 'Hess, Rita' from 01/03/06 to 01/04/06. To the right of the table is a 'Toolbox...' menu with options: 'Export recordings', 'Export results', 'Delete this page', 'Launch Outbox', 'Launch Play bay', 'Play this page', 'Results as report', and 'Send this page'. Below the table are navigation controls: '[jump]', '12 results', '[previous]', and '[next]'. At the bottom is a media player with play, pause, and stop buttons. On the right side, there is a 'DETAILS' panel for 'Hess, Rita' showing metadata: Date (January 18, 2006), Time (9:02:15 AM), Length (00:01:34), Direction (Inbound), and Label (x1147). Below this are input fields for Display, Number, Dialed, Track #, and Account, followed by 'Update', 'Save', and 'Delete' buttons. At the bottom right is a 'Recording history' section showing '01/18/06 - Hess R [Recording]'.

Id	Date	Begin	Length
☐ Hess, Rita	01/03/06	09:32:40 AM	00:01:07
☐ Hess, Rita	01/03/06	09:37:18 AM	00:00:54
☐ Hess, Rita	01/03/06	09:38:26 AM	00:01:44
☐ Hess, Rita	01/03/06	09:40:11 AM	00:01:31
☐ Hess, Rita	01/03/06	09:41:42 AM	00:01:03
☐ Hess, Rita	01/03/06	09:42:45 AM	00:00:14
☐ Hess, Rita	01/03/06	09:44:11 AM	00:00:08
☐ Hess, Rita	01/03/06	11:09:45 AM	00:00:40
☐ Hess, Rita	01/03/06	12:35:27 PM	00:00:10
☐ Hess, Rita	01/03/06	01:01:41 PM	00:00:09
☐ Hess, Rita	01/03/06	03:51:10 PM	00:00:09
☐ Hess, Rita	01/04/06	08:22:46 AM	00:06:18

[jump] 12 results [previous] [next]

Media player controls: Play, Pause, Stop, and volume buttons.

DETAILS **NOTES** **EVA**

Hess, Rita

Date: January 18, 2006
Time: 9:02:15 AM
Length: 00:01:34
Direction: Inbound
Label: x1147

Display: ANSWER Tracy Hila
Number:
Dialed:
Track #: Add tracking number
Account:

Update Save Delete

Recording history

01/18/06 - Hess R [Recording]

Follow the directions applicable to your system for saving and opening zipped files. Audio recordings are exported as **.wav** files; audio/video recordings as **.avi** files. Using the most common software for zipping and unzipping files, play the recording(s) by double-clicking the one you want to hear. *Encrypted files are not exported.* To export recordings, a user must have the Save and Send privilege. (Privileges are assigned in the Manager application.)



IMPORTANT NOTE about Toolbox tasks : recordings that are not in the database because they are part of a Scheduled Transfer (configured in **OnViews**) can NOT be exported, deleted, played or sent.

Export Results

Exporting [RECENT RECORDINGS](#) or [SEARCH](#) results allows you to save those results and use them in applications other than **OnviCord**. To use the export results in another software application, **OnviCord** saves the results as a **.txt** (text) file in which each piece of data is separated by a comma. It is a popular way to transfer data from one application to another and can be used with software that opens comma-delimited files. If you do not have export privileges, the export option is dimmed and unavailable. To export results, a user only requires the Search and Play privilege. (Privileges are assigned in the Manager application.)

The screenshot displays the OnviCord application interface. On the left, a table lists search results for 'Hess, Rita' on 01/03/06. A red box highlights the 'Toolbox...' button in the top right of the results table, which has opened a dropdown menu. The menu options are: 'Toolbox...', 'Export recordings', 'Export results', 'Delete this page', 'Launch Outbox', 'Launch Play bay', 'Play this page', 'Results as report', and 'Send this page'. The 'Export results' option is highlighted. Below the table is a search bar with '[jump]', a results count of '12 results', and navigation links '[previous]' and '[next]'. At the bottom is a media player control bar. On the right, a sidebar contains a 'DETAILS' tab, a 'NOTES' tab, and an 'EVALUATE' tab. The 'DETAILS' tab is active, showing information for 'Hess, Rita' including Date (January 18, 2006), Time (9:02:15 AM), Length (00:01:34), Direction (Inbound), and Label (x1147). Below this is a 'Recording history' section showing a single entry: '01/18/06 - Hess R [Recording]'. At the bottom of the sidebar are buttons for 'Update', 'Save', and 'Delete'.

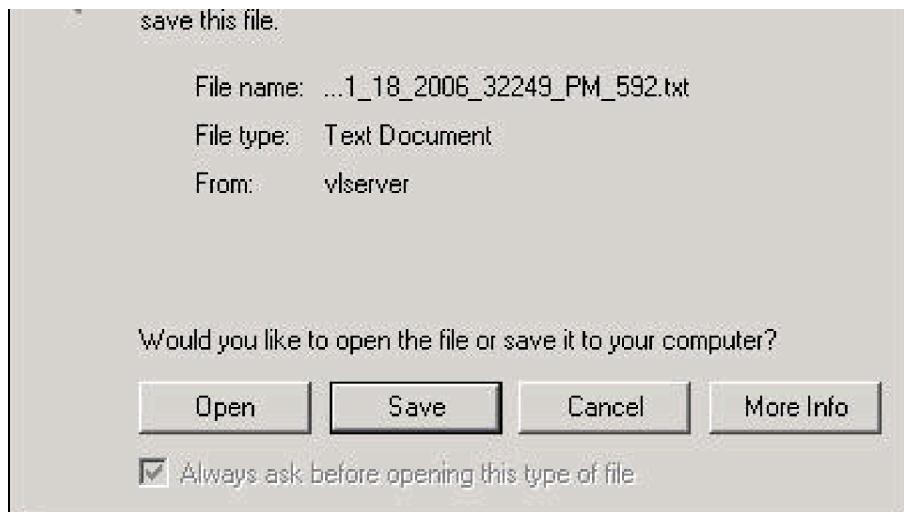
Id	Date	Begin	Length
☐ Hess, Rita	01/03/06	09:32:40 AM	00:01:07
☐ Hess, Rita	01/03/06	09:37:18 AM	00:00:54
☐ Hess, Rita	01/03/06	09:38:26 AM	00:01:44
☐ Hess, Rita	01/03/06	09:40:11 AM	00:01:31
☐ Hess, Rita	01/03/06	09:41:42 AM	00:01:03
☐ Hess, Rita	01/03/06	09:42:45 AM	00:00:14
☐ Hess, Rita	01/03/06	09:44:11 AM	00:00:08
☐ Hess, Rita	01/03/06	11:09:45 AM	00:00:40
☐ Hess, Rita	01/03/06	12:35:27 PM	00:00:10
☐ Hess, Rita	01/03/06	01:01:41 PM	00:00:09
☐ Hess, Rita	01/03/06	03:51:10 PM	00:00:09
☐ Hess, Rita	01/04/06	08:22:46 AM	00:06:18

[jump] 12 results [previous] [next]

File Download

Some files can harm your computer. If the file information below looks suspicious, or you do not fully trust the source, do not open or

To export your results, select Export Results from your Toolbox. A File Download window will open asking if you want to Open the file or Save it. Choose Save. You will then be asked to save the file and choose a location.



When prompted, enter a name and location for the saved file. The Save as File Type box automatically defaults to a "text document" and will be saved with commas separating each field of data. To use the data in another software application, follow the manufacturer's instructions for opening/importing files of this type. Each column value in this type of file is separated from the next column value by a comma, and each row starts a new line. It looks similar to this:

Adams, John, Extension 412, Floor 3, North Wing

Anderson, Mary, Extension 606, Floor 2, West Wing

EXAMPLE: A 911 facility manager wants to create a report in another program showing how many calls operators handled compared to the same period last year. The manager can search the database and export the results for use with other software programs.

Delete This Page

Choose this option from your Toolbox to delete all records on the page **AND** the actual recordings. To use this feature, a user must have the Delete Recordings privilege enabled. (Privileges are assigned in the **Manager** application.)

Results 1-12 of 73.

	Id	Date ▲	Begin	Length	
☐	Hess, Rita	01/03/06	09:32:40 AM	00:01:07	
☐	Hess, Rita	01/03/06	09:37:18 AM	00:00:54	
☐	Hess, Rita	01/03/06	09:38:26 AM	00:01:44	
☐	Hess, Rita	01/03/06	09:40:11 AM	00:01:31	
☐	Hess, Rita	01/03/06	09:41:42 AM	00:01:03	
☐	Hess, Rita	01/03/06	09:42:45 AM	00:00:14	
☐	Hess, Rita	01/03/06	09:44:11 AM	00:00:08	
☐	Hess, Rita	01/03/06	11:09:45 AM	00:00:40	
☐	Hess, Rita	01/03/06	12:35:27 PM	00:00:10	
☐	Hess, Rita	01/03/06	01:01:41 PM	00:00:09	
☐	Hess, Rita	01/03/06	03:51:10 PM	00:00:09	
☐	Hess, Rita	01/04/06	08:22:46 AM	00:06:18	

[jump]

12 results ▼

[previous] [next]

Toolbox...

Toolbox...

Export recordings

Export results

Delete this page

Launch Outbox

Launch Play bay

Play this page

Results as report

Send this page

DETAILS

NOTES

EVA

Hess, Rita

Date:

January 18, 2006

Time:

9:02:15 AM

Length:

00:01:34

Direction:

Inbound

Label:

x1147

Display:

ANSWER Tracy Hila

Number:

Dialed:

Track #:

Add tracking number

Account:

Update

Save

Delete

Recording history

01/18/06 - Hess R [Recording]



IMPORTANT NOTE about Toolbox tasks: recordings that are not in the database because they are part of a Scheduled Transfer (configured in **Onviews**) can NOT be exported, deleted, played or sent.

Launch Outbox

Choose Launch Outbox from the toolbox to [email](#) recordings and/or recording details. See how to [email a recording](#) here.

Results 1-12 of 73.

☐	Id	Date ▲	Begin	Length	
☐	Hess, Rita	01/03/06	09:32:40 AM	00:01:07	
☐	Hess, Rita	01/03/06	09:37:18 AM	00:00:54	
☐	Hess, Rita	01/03/06	09:38:26 AM	00:01:44	
☐	Hess, Rita	01/03/06	09:40:11 AM	00:01:31	
☐	Hess, Rita	01/03/06	09:41:42 AM	00:01:03	
☐	Hess, Rita	01/03/06	09:42:45 AM	00:00:14	
☐	Hess, Rita	01/03/06	09:44:11 AM	00:00:08	
☐	Hess, Rita	01/03/06	11:09:45 AM	00:00:40	
☐	Hess, Rita	01/03/06	12:35:27 PM	00:00:10	
☐	Hess, Rita	01/03/06	01:01:41 PM	00:00:09	
☐	Hess, Rita	01/03/06	03:51:10 PM	00:00:09	
☐	Hess, Rita	01/04/06	08:22:46 AM	00:06:18	

[jump] [12 results] [previous] [next]

DETAILS **NOTES** **EVALUATION**

Hess, Rita

Date: January 18, 2006
Time: 9:02:15 AM
Length: 00:01:34
Direction: Inbound
Label: x1147

Display: ANSWER Tracy Hiland CALLED ID R
 Number:
 Dialed:
 Track #: Add tracking number
 Account:

Update Save Delete

Recording history

01/18/06 - Hess R [Recording]

Only users with the Save and Send privilege enabled have access to an Outbox. (Privileges are assigned in the Manager application.)

Outbox - 4 recordings

SEND

To:
Subject:

Total attachment size: 1,040 KB

Hess, Rita - January 17th, 2006 - 4:26:20 PM

DETAILS

Date: January 17th, 2006

Recordings [clear] Attach files

☒	☒	☒	☒	☒	☒	☒	☒	☒	☒
☒	☒	Hess, Rita	01/17/06 04:26 PM	☒	☒	☒	☒	☒	☒
☒	☒	Hess, Rita	01/17/06 10:48 AM	☒	☒	☒	☒	☒	☒
☒	☒	Hess, Rita	01/16/06 12:31 PM	☒	☒	☒	☒	☒	☒

Sent items 1-15 of 33. Clear items...

To: rita.hess@onvisource.com	01/11/06	☒
To: ritah@voicelogger.com	06/20/05	☒
To: ritah@voicelogger.com	06/20/05	☒
To: okwriter@yahoo.com	03/09/05	☒
To: rita@ritahess.com	10/22/04	☒
To: okwriter@yahoo.com, rita.hes	10/22/04	☒
To: okwriter@yahoo.com, rita.hes	10/22/04	☒
To: okwriter@yahoo.com, rita.hes	10/22/04	☒
To: rita.hess@voicelogger.com	10/22/04	☒
To: okwriter@yahoo.com, ritah@v	10/22/04	☒
To: aprilb@voicelogger.com	09/24/04	☒
To: aprilb@voicelogger.com	08/05/04	☒
To: ritah@voicelogger.com	03/23/04	☒
To: ritah@voicelogger.com	03/23/04	☒

☒ Hess, Rita 01/13/06 01:02 PM ☒ ☐ ☒ ☐	To: ritah@voicelogger.com 03/23/04 ☒
[previous] [next]	



IMPORTANT NOTE: (See [Privileges](#)) To use the e-mail feature, you **must** enter a user e-mail address on the [HOME](#) page.

Launch Play Bay

Select Launch Play Bay to open a personal [Play Bay](#) in a separate window and begins playing the calls there. A maximum of 15 calls may be added to your Play Bay. To play recordings (whether in the [Play Bay](#) area or not), a user must have the Search and Play privilege. (Privileges are assigned in the Manager application.)

See how to operate your [play bay](#) here.

Results 1-12 of 73.

	Id	Date ▲	Begin	Length	
☐	Hess, Rita	01/03/06	09:32:40 AM	00:01:07	
☐	Hess, Rita	01/03/06	09:37:18 AM	00:00:54	
☐	Hess, Rita	01/03/06	09:38:26 AM	00:01:44	
☐	Hess, Rita	01/03/06	09:40:11 AM	00:01:31	  
☐	Hess, Rita	01/03/06	09:41:42 AM	00:01:03	  
☐	Hess, Rita	01/03/06	09:42:45 AM	00:00:14	  
☐	Hess, Rita	01/03/06	09:44:11 AM	00:00:08	  
☐	Hess, Rita	01/03/06	11:09:45 AM	00:00:40	  
☐	Hess, Rita	01/03/06	12:35:27 PM	00:00:10	  
☐	Hess, Rita	01/03/06	01:01:41 PM	00:00:09	  
☐	Hess, Rita	01/03/06	03:51:10 PM	00:00:09	  
☐	Hess, Rita	01/04/06	08:22:46 AM	00:06:18	  

[jump]

12 results ▼

[previous]

[next]



Toolbox...

Export recordings

Export results

Delete this page

Launch Outbox

Launch Play bay

Play this page

Results as report

Send this page

DETAILS

NOTES

EVALUATION



Hess, Rita

Date:

January 18, 2006

Time:

9:02:15 AM

Length:

00:01:34

Direction:

Inbound

Label:

x1147

Display:

ANSWER Tracy Hila

Number:

Dialed:

Track #:

Add tracking number

Account:

Update

Save

Delete

Recording history

01/18/06 - Hess R [Recording]



IMPORTANT NOTE about Toolbox tasks : recordings that are not in the database because they are part of a Scheduled Transfer (configured in **OnViews**) can NOT be exported, deleted, played or sent.

Play This Page

This selection opens a [Play Bay](#) and plays all recordings on the page in the order shown (if still stored on the recording server). The Play This Page option does not appear when viewing [Recent Recordings](#). This feature requires the Search and Play privilege and the page must contain 15 or less recordings. Otherwise, the option is unavailable. (Privileges are assigned in the Manager application.)

Results 1-12 of 73.

	Id	Date ▲	Begin	Length	
☐	Hess, Rita	01/03/06	09:32:40 AM	00:01:07	
☐	Hess, Rita	01/03/06	09:37:18 AM	00:00:54	
☐	Hess, Rita	01/03/06	09:38:26 AM	00:01:44	
☐	Hess, Rita	01/03/06	09:40:11 AM	00:01:31	
☐	Hess, Rita	01/03/06	09:41:42 AM	00:01:03	
☐	Hess, Rita	01/03/06	09:42:45 AM	00:00:14	
☐	Hess, Rita	01/03/06	09:44:11 AM	00:00:08	
☐	Hess, Rita	01/03/06	11:09:45 AM	00:00:40	
☐	Hess, Rita	01/03/06	12:35:27 PM	00:00:10	
☐	Hess, Rita	01/03/06	01:01:41 PM	00:00:09	
☐	Hess, Rita	01/03/06	03:51:10 PM	00:00:09	
☐	Hess, Rita	01/04/06	08:22:46 AM	00:06:18	

[jump]

12 results ▼

[previous] [next]

Toolbox...

Toolbox...

Export recordings

Export results

Delete this page

Launch Outbox

Launch Play bay

Play this page

Results as report

Send this page

DETAILS

NOTES

EVA

Hess, Rita

Date: January 18, 2006

Time: 9:02:15 AM

Length: 00:01:34

Direction: Inbound

Label: x1147

Display:

ANSWER Tracy Hila

Number:

Dialed:

Track #:

Add tracking number

Account:

Update

Save

Delete

Recording history

01/18/06 - Hess R [Recording]



IMPORTANT NOTE about Toolbox tasks : recordings that are not in the database because they are part of a Scheduled Transfer (configured in **OnViews**) can NOT be exported, deleted, played or sent.

Send This Page

Select this option to launch your Outbox and send this page by [e-mail](#). Sending a page of search results requires a user to have the Save and Send privilege. (Privileges are assigned in the Manager application.)

Results **1-12** of **73**.

	Id	Date ▲	Begin	Length	
☐	Hess, Rita	01/03/06	09:32:40 AM	00:01:07	
☐	Hess, Rita	01/03/06	09:37:18 AM	00:00:54	
☐	Hess, Rita	01/03/06	09:38:26 AM	00:01:44	
☐	Hess, Rita	01/03/06	09:40:11 AM	00:01:31	
☐	Hess, Rita	01/03/06	09:41:42 AM	00:01:03	
☐	Hess, Rita	01/03/06	09:42:45 AM	00:00:14	
☐	Hess, Rita	01/03/06	09:44:11 AM	00:00:08	
☐	Hess, Rita	01/03/06	11:09:45 AM	00:00:40	
☐	Hess, Rita	01/03/06	12:35:27 PM	00:00:10	
☐	Hess, Rita	01/03/06	01:01:41 PM	00:00:09	
☐	Hess, Rita	01/03/06	03:51:10 PM	00:00:09	
☐	Hess, Rita	01/04/06	08:22:46 AM	00:06:18	

[jump] 12 results ▼ [previous] [next]

DETAILS **NOTES** **EVA**

Hess, Rita

Date: January 18, 2006
Time: 9:02:15 AM
Length: 00:01:34
Direction: Inbound
Label: x1147

Display: ANSWER Tracy Hila
Number:
Dialed:
Track #: Add tracking number
Account:

Recording history
01/18/06 - Hess R [Recording]



IMPORTANT NOTE about Toolbox tasks: recordings that are not in the database because they are part of a Scheduled Transfer (configured in **OnViews**) can NOT be exported, deleted, played or sent.

Results as Report

Select this option to view your results in [report](#) form.

Results 1-12 of 73.

	<u>ID</u>	<u>Date</u> ▲	<u>Begin</u>	<u>Length</u>	
☐	Hess, Rita	01/03/06	09:32:40 AM	00:01:07	
☐	Hess, Rita	01/03/06	09:37:18 AM	00:00:54	
☐	Hess, Rita	01/03/06	09:38:26 AM	00:01:44	
☐	Hess, Rita	01/03/06	09:40:11 AM	00:01:31	
☐	Hess, Rita	01/03/06	09:41:42 AM	00:01:03	
☐	Hess, Rita	01/03/06	09:42:45 AM	00:00:14	
☐	Hess, Rita	01/03/06	09:44:11 AM	00:00:08	
☐	Hess, Rita	01/03/06	11:09:45 AM	00:00:40	
☐	Hess, Rita	01/03/06	12:35:27 PM	00:00:10	
☐	Hess, Rita	01/03/06	01:01:41 PM	00:00:09	
☐	Hess, Rita	01/03/06	03:51:10 PM	00:00:09	
☐	Hess, Rita	01/04/06	08:22:46 AM	00:06:18	

Toolbox...

Export recordings

Export results

Delete this page

Launch Outbox

Launch Play bay

Play this page

Results as report

Send this page

12 results

[jump]

[previous]

[next]

DETAILS

NOTES

EVALUATION

Hess, Rita

Date:

January 18, 2006

Time:

9:02:15 AM

Length:

00:01:34

Direction:

Inbound

Label:

x1147

Display:

ANSWER Tracy Hiland CALLED ID F

Number:

Dialed:

Track #:

Add tracking number

Account:

Update

Save

Delete

Recording history

01/18/06 - Hess R [Recording]

This option is **NOT** available in Recent Recording results. Read more about [reports](#) here.

Recording statistics - January 19th, 2006					
Generated based on Jan 1st, 2006 12:00 AM to Jan 18th, 2006 11:59 PM by Rita Hess.					
Name ▲	Total recs	Total time	Avg length	Avg recs / day	Avg time / day
Hess, Rita	77	01:57:28	00:01:31	6.42 / 12	00:09:47 / 12
x1147	77	01:57:28	00:01:31	6.42 / 12	00:09:47 / 12

Full View

Click the arrow icon next to the Toolbox drop-down to launch Full View mode, which allows you to see your results in more detail.

Results 1-10 of 10. Toolbox...

	Id	Date	Begin ▼	Length			
☐	Hess, Rita	01/18/06	03:55:01 PM	00:00:07			
☐	Hess, Rita	01/18/06	09:02:15 AM	00:01:34			
☐	Hess, Rita	01/17/06	04:51:41 PM	00:01:06			
☐	Hess, Rita	01/17/06	04:26:20 PM	00:09:40			
☐	Hess, Rita	01/17/06	02:25:36 PM	00:00:08			
☐	Hess, Rita	01/17/06	12:31:29 PM	00:00:29			
☐	Hess, Rita	01/17/06	10:57:23 AM	00:00:07			
☐	Hess, Rita	01/17/06	10:48:40 AM	00:00:06			
☐	Hess, Rita	01/16/06	02:05:40 PM	00:00:52			
☐	Hess, Rita	01/16/06	12:54:23 PM	00:00:08			

[jump] 10 results [previous] [next]

DETAILS **NOTES** **EVALUATION**

Hess, Rita

Date: January 18, 2006
Time: 3:55:01 PM
Length: 00:00:07
Direction: Outbound
Label: x1147

Display: ANSWER April Boyd CALLED ID Api
 Number:
 Dialed:
 Track #: Add tracking number
 Account:

Update Save Delete

Recording history

01/18/06 - Hess R [Recording]

Columns can't be rearranged in Full View, but you can use the drop-down box to see only the columns selected for your search **OR** to also see additional columns of information that pertain to the recording(s). The scroll bar on the right side allows you to scroll up/down through the information.

Results 1-10 of 10.

Standard columns
Standard columns
Selected columns only

	Id	Date	Begin ▼	Length	Display	Number	Dialed			
☐	Hess, Rita	01/18/06	03:55:01 PM	00:00:07	ANSWER Apr			Outbound		
☐	Hess, Rita	01/18/06	09:02:15 AM	00:01:34	ANSWER Tra			Inbound		
☐	Hess, Rita	01/17/06	04:51:41 PM	00:01:06	ANSWER Bry			Outbound		
☐	Hess, Rita	01/17/06	04:26:20 PM	00:09:40	EXT ANS Loc	5310943910		Inbound		
☐	Hess, Rita	01/17/06	02:25:36 PM	00:00:08	EXT ANS Loc		6	Outbound		
☐	Hess, Rita	01/17/06	12:31:29 PM	00:00:29				Unknown		
☐	Hess, Rita	01/17/06	10:57:23 AM	00:00:07	ANSWER Apr			Outbound		
☐	Hess, Rita	01/17/06	10:48:40 AM	00:00:06	ANSWER Apr			Outbound		
☐	Hess, Rita	01/16/06	02:05:40 PM	00:00:52	ANSWER Kim			Inbound		
☐	Hess, Rita	01/16/06	12:54:23 PM	00:00:08	BizSol CALL F			Outbound		

Full View includes a printer icon in the upper right corner for quickly printing the information.

To close Full View and return to the [SEARCH RESULTS](#) page, click the **X** in the upper right corner.

About Each Recording

On the left of the search results or recent recordings screen, each line represents one recording.

The screenshot displays the recording management interface. On the left, a table lists 12 recordings (results 1-12 of 18). Each row includes columns for Id, Date, Begin time, and Length. To the right of each row are three icons: a headphones icon for audio playback, a barcode icon for details, and an envelope icon for email. The first recording, 'Hess, Rita' on 12/16/05 at 01:10:42 PM, is highlighted. Below the table are controls for jumping to a specific result (currently 12), a dropdown for the number of results (12), and navigation links for previous and next results. A playback controller is also visible at the bottom left. On the right, the 'DETAILS' tab is active for the selected recording 'Hess, Rita'. It shows the date (December 16, 2005), time (1:10:42 PM), length (00:01:21), direction (Outbound), and label (Rita). Below this, there are input fields for Display (Rita Hess), Number (3029), Dialed (3033), Track # (4AFF548924), and Account (Adams FlyAway Travel). At the bottom right of the details panel are buttons for Update, Save, and Delete, along with a green status indicator. A 'Recording history' section on the far right lists recent actions: 01/30/06 - Administrator [Attach], 01/30/06 - Administrator [Attach], 01/23/06 - Administrator [Account], and 12/16/05 - Hess R [Recording].

Id	Date	Begin	Length
Hess, Rita	12/16/05	01:10:42 PM	00:01:21
Hess, Rita	12/16/05	01:10:08 PM	00:00:05
Hess, Rita	12/16/05	09:33:11 AM	00:00:08
Hess, Rita	12/14/05	04:10:40 PM	00:00:11
Hess, Rita	12/14/05	02:55:30 PM	00:00:14
Hess, Rita	12/12/05	11:13:10 AM	00:01:01
Hess, Rita	12/12/05	11:06:41 AM	00:00:08
Hess, Rita	12/12/05	11:05:46 AM	00:00:07
Hess, Rita	12/12/05	11:05:09 AM	00:00:10
Hess, Rita	12/12/05	11:04:02 AM	00:00:24
Hess, Rita	12/12/05	10:45:00 AM	00:00:06
Hess, Rita	12/12/05	10:44:38 AM	00:00:17

DETAILS | **NOTES** | **EVALUATION**

Hess, Rita

Date: December 16, 2005
Time: 1:10:42 PM
Length: 00:01:21
Direction: Outbound
Label: Rita

Display: Rita Hess
 Number: 3029
 Dialed: 3033
 Track #: 4AFF548924
 Account: Adams FlyAway Travel

Update Save Delete

Recording history

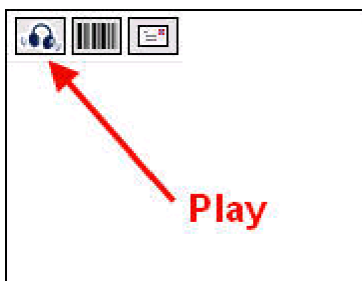
- 01/30/06 - Administrator [Attach]
- 01/30/06 - Administrator [Attach]
- 01/23/06 - Administrator [Account]
- 12/16/05 - Hess R [Recording]

Play

Multiple icons for each recording are shown on the [search](#) results screen or [recent recordings](#) screen. The first icon indicates the type of recording (headphones for audio only or a computer monitor for audio/video combination). The second icon (a bar code symbol) represents [details](#) about the recording, and the third (an envelope) enables you to [email](#) details about the recording and/or the actual recording.



To the right of each recording, click the first icon (headphones for audio only or a computer monitor for audio/video combination) to **play** the recording. You can control the playback using the [Playback Controller](#). When listening to the "life of a recording" (available only with CTI), you only have access to the segment of the call made by users/channels you have access to.





NOTE: The play icon is **only** available if the recording is presently stored on the server.



A dimmed icon with a red X indicates the recording is no longer on the server and may have been purged. Check with your system administrator to see if the recording can be recovered from your backup media. The send icon may be available even if the recording is not stored on the server, since you can still e-mail the call details minus the actual recording. See the [ICON KEY](#) to view all icon descriptions.



A headphones icon with a tiny padlock in the upper right corner indicates the recording is *encrypted* on the server.

IMPORTANT NOTE: Recordings are NOT encrypted during the transmission from your server to your computer. If you require this level of protection, contact your system administrator about setting up a Secure Sockets Layer (SSL), a protocol for secure network communications. Instructions for establishing a Secure Sockets Layer are described in the System Setup Guide that accompanied your shipment.



If the first icon appears with a clock, it means the selected recording is slated for a scheduled transfer into the data server at a later time. (Scheduled transfers are configured by your system administrator in **OnViews**.) To immediately force the transfer of the recording into the database so that it can be played, press the headphones icon, then press F5 to refresh your screen.

Details

Click the middle icon to display **details** about this recording (shown on the right half of the screen). [Details](#) are covered more thoroughly later in this section.



Depending on your search parameters, Detail icons may also contain the letters N (note), E (evaluation), or NE (note and evaluation) to indicate additional information about the recording exists. An icon with NE indicates at least one [note](#) and one [evaluation](#) exist.



A plain icon means there are no Notes,

	Evaluations, or Attachments associated with the recording.
	An icon with an N indicates at least one note exists.
	A small letter A in the upper right corner of a Details icon indicates the recording has a File Attachment .

(See the [ICON KEY](#) to learn the meaning of other **OnviCord Web** icons.)

Email

Click the last icon to **e-mail** the recording (or the recording details). You'll find detailed instructions on how to [E-mail a Recording](#), later in this section. While you can e-mail the details of an encrypted recording, the actual recording can **NOT** be sent.



The columns shown on the Search Results page are based on your [Default Columns](#) choices on the Search page.

Results 1-25 of 25.					Toolbox...	
	<u>Date</u>	<u>Begin</u>	<u>Length</u>			
☐	Hess, Rita	01/18/06	09:02:15 AM	00:01:34		
☐	Hess, Rita	01/17/06	04:51:41 PM	00:01:06		

To change a column to display other available information, click the column title. For example, selecting the Date, Begin Time and Length columns displays those three information fields on the results page.

<u>Begin</u>	Replace with
09:02:15	Account
04:51:41	Color code
04:26:20	Date
02:25:36	Dialed digits
12:31:29	Direction
	Display
	End time
	Label

10:57:23	Length
	Number
	User name
10:48:40 AM	00:00:06

However, when viewing Search Results (rather than Recent Recordings) clicking a column header opens a box where you can choose a different field of information **OR** sort the existing results by this column in either ascending or descending order. In ascending order, users are listed alphabetically, followed by labeled channels (alphabetically) and channels (numerically).

Length	Sort
00:01:0	Ascending ▲
	Descending ▼
00:00:5	Replace with
00:01:4	Account
00:01:3	Begin time
00:01:3	Color code
00:01:0	Date
00:01:0	Dialed digits
00:00:1	Direction
00:00:1	Display
00:00:0	End time
00:00:0	Label
00:00:4	Number
	User name

Playback Controller

The playback controller appears beneath the list of search results or recent recordings.

Results 1-12 of 78. Toolbox...

	Id	Date	Begin ▼	Length	
☐	Hess, Rita	01/19/06	10:38:43 AM	00:00:08	
☐	Hess, Rita	01/18/06	04:51:57 PM	00:00:10	
☐	Hess, Rita	01/18/06	04:51:22 PM	00:00:14	
☐	Hess, Rita	01/18/06	04:38:14 PM	00:05:18	
☒	Hess, Rita	01/18/06	03:55:01 PM	00:00:07	
☐	Hess, Rita	01/18/06	09:02:15 AM	00:01:34	
☐	Hess, Rita	01/17/06	04:51:41 PM	00:01:06	
☐	Hess, Rita	01/17/06	04:26:20 PM	00:09:40	
☒	Hess, Rita	01/17/06	02:25:36 PM	00:00:08	
☐	Hess, Rita	01/17/06	12:31:29 PM	00:00:29	
☐	Hess, Rita	01/17/06	10:57:23 AM	00:00:07	
☐	Hess, Rita	01/17/06	10:48:40 AM	00:00:06	

[jump] 12 results [previous] [next]

Hess, Rita Bookmarks... +

Speed

Jan 17, 2006 12:31:35 PM 46 KB 00:00:29

**Playback
Controller**

Clicking the headphones (or computer monitor if [screen capture](#) is enabled) next to a search result automatically plays the recording (if it exists on the server). Use the playback controller to adjust playback features or perform tasks for the recording. If [Screen Capture Playback](#) is available, this section is slightly different.

In the lower left corner of the Playback Controller are Play, Pause, and Stop buttons.

Hess, Rita Bookmarks... +

Speed

Jan 17, 2006 12:31:29 PM 46 KB 00:00:29

In the lower right are five icons to control the playback speed. They are (respectively): minimum playback speed, slow playback speed, normal playback speed, fast playback speed and maximum playback speed.

Hess, Rita Bookmarks... +

Speed



Adding one or more bookmarks to a recording allows you to quickly return to a particular section.



To add a bookmark, click the + sign in the Bookmark area.



When the blank line pops open, type the text that will identify the bookmark and click Add.



To find the area again, use the drop-down box and select the text for that bookmark. The Playback Controller will automatically jump to that section in the recording.

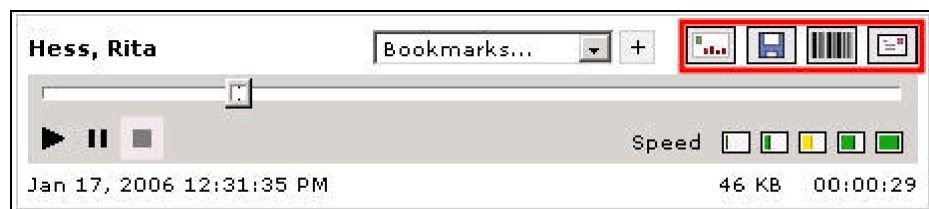


To delete a bookmark from the recording, select it from the drop-down list and click the X. *This does not delete any part of the recording! It only deletes the bookmark placed there.*

HINT: You can simultaneously work with more than one recording in your search results. For example, click the headphones to listen to one recording. While it plays, click the details icon next to a different recording to view its details (on the right) **OR** listen to one recording while performing an evaluation on another.

Use [Play Bay](#) to hear more than one recording at a time (if the recording times overlap and you play them in synchronized mode).

In the upper right corner of the Playback Controller area are four additional icons that pertain to the selected (highlighted) recording. While on the [search results](#) or [recent recordings results](#) page, hold your mouse briefly over an icon to learn its function or refer to the chart below. (The [ICON KEY](#) explains other **OnviCord Web** icons.)



The first icon adds the selected recording to your personal [Play Bay](#) where recordings are stored for later playback. If this icon is gray, the recording is not in your Play Bay. If the icon is yellow, it is listed in your Play Bay.



The second icon saves the recording to a disk. **IMPORTANT NOTE:** If a recording is encrypted, it is **not** encrypted when saved to your chosen location.



This icon provides [Details](#) for this recording like the one in Search Results, indicating whether at least one [Note](#), [Evaluation](#), and/or [Attachment](#) exists.



The last icon allows you to [E-mail a Recording](#) or the recording details. (While you can e-mail the details of an encrypted recording, the actual recording can **NOT** be sent.) If this icon is gray, the recording is not currently listed in your e-mail Outbox. If the icon is yellow, it is listed in your Outbox.

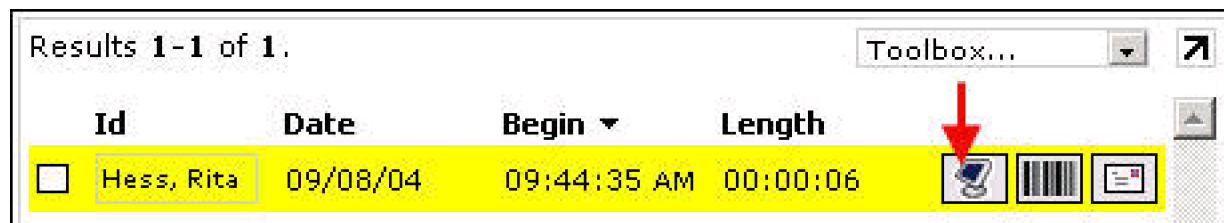


Screen Capture Playback

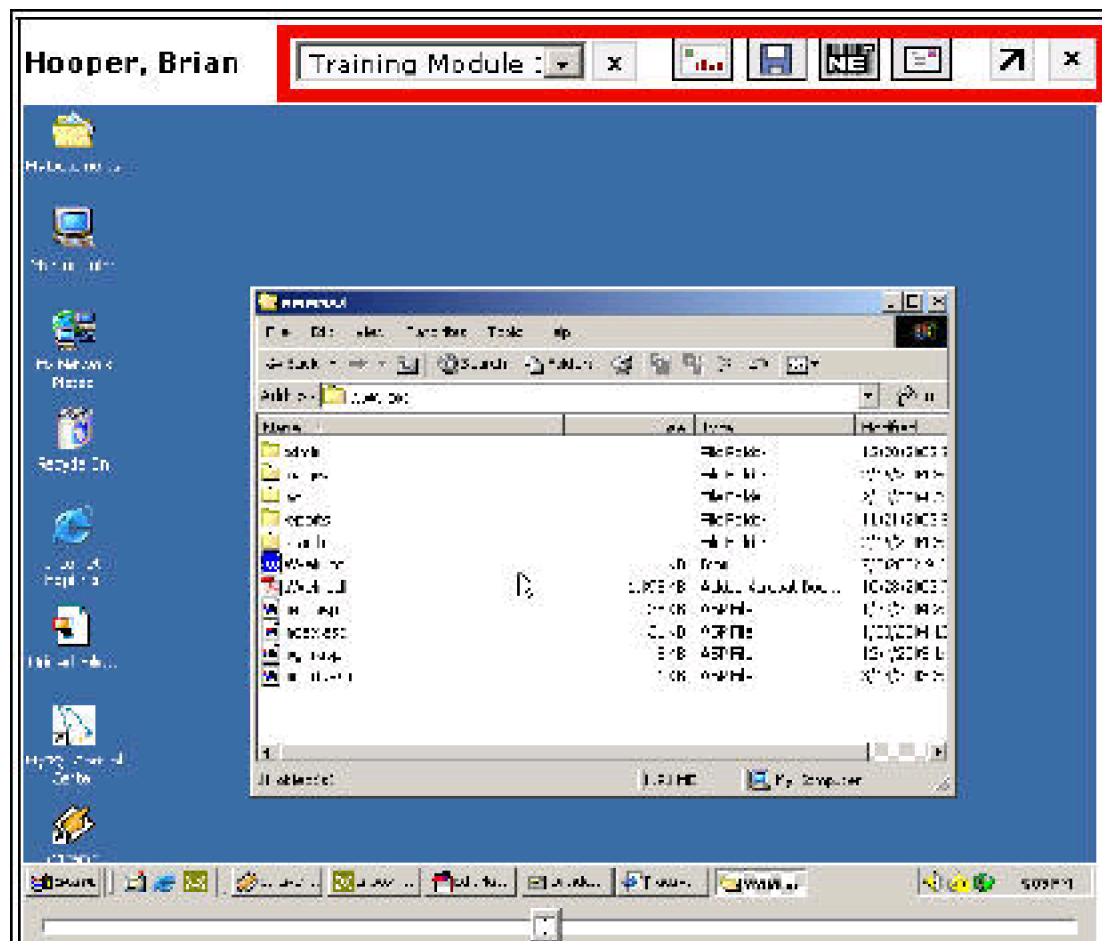


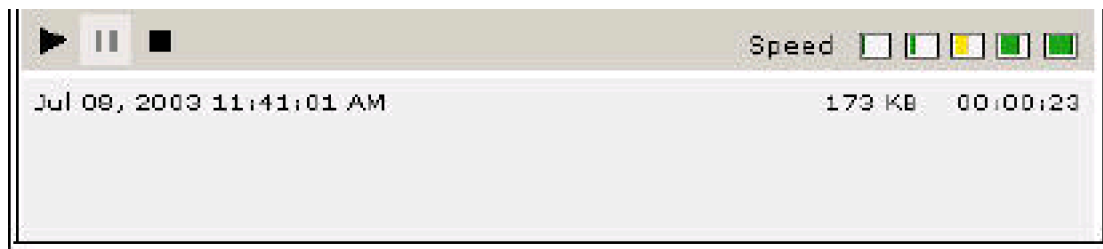
A computer monitor icon next to a recording on the [search results](#) or [recent recordings](#) screen indicates that screen capture was enabled for the recording. This means that the agent's onscreen movements were captured along with the audio. Screen Capture Playback allows authorized users to simultaneously listen to the audio portion of a recording while monitoring the video portion.

Click the computer monitor to play the video.



Bookmarks and other features that appear at the bottom of the Playback Controller section appear at the top of a recording with Screen Capture. As described in the [Playback Controller](#) section, bookmarks function the same way on recordings with Screen Capture but your screen will look different (see below).





When playing a recording with screen capture, the [Full View](#) (arrow) icon on the far right launches a larger version of the video.

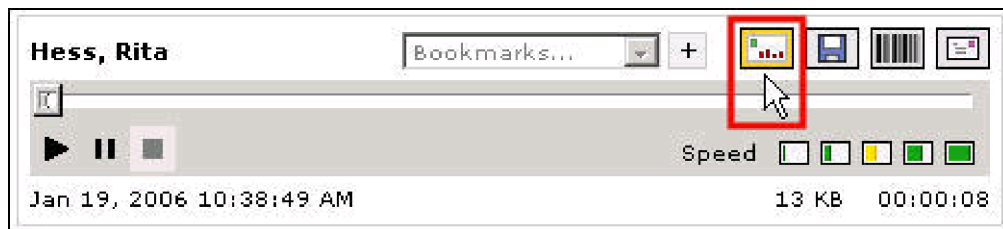
Results 1-1 of 1. Toolbox... 

	Id	Date	Begin ▼	Length	
☐	Hess, Rita	09/08/04	09:44:35 AM	00:00:06	  

After reviewing a screen capture recording, click the **X** in the upper right corner to return to your results page.

Play Bay

Your personal Play Bay is an area where recordings are stored for later playback. Recordings are added to your Play Bay by clicking on the headphones (or computer monitor icon) *for that recording* in the [Playback Controller](#) section in the lower left corner of your results page. When the recording begins to play, click the gray Play Bay icon in the [Playback Controller](#) area at the bottom of the results page. A gray icon indicates the item is not currently in your Play Bay. A yellow icon indicates the recording is listed in your Play Bay. (**NOTE:** Adding a recording that includes screen capture to your Play Bay adds only the audio portion.)



Your Play Bay is launched (and recordings begin playing) using the drop-down item in your [Toolbox](#) (Launch Play Bay). Once your play bay is opened, use the drop-down box on the right to listen to your play bay recordings in either Sequential Playback or Synchronized Playback. Your play bay may look slightly different depending on which Media Player you are using.



You can also listen to a single page of recordings from the Results page by using the [Toolbox](#) drop-down box and selecting Play This Page. When you select Play This Page, the recordings are placed into a "temporary" area (much like your personal Play Bay) and automatically begin playing sequentially by default. The Play This Page option is not available in your Toolbox if you've set the page to display more than 12 results per page.



NOTE: Play Bay is also launched with the Life of Recording icon (available only with CTI) in the [Recording History](#). When listening to a recording with this method, you only have access to the segment of the call made by users/channels you have access to.

Your personal Play Bay holds a maximum of 15 recordings. After that, additional recordings put in Play Bay will replace the first ones added on a FIFO (first-in-first-out) basis. *Choosing to Play This Page from your Toolbox will not remove any items from your Play Bay.*

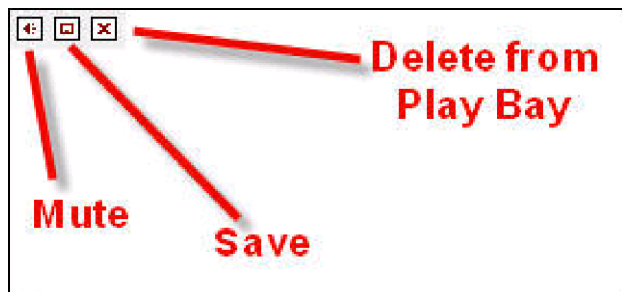
EXAMPLE: Mary adds one recording to her Play Bay. She then adds a group of 14 more. Her Play Bay is now full. When she adds one more recording, it pushes the first one out (FIFO) and her Play Bay contains the group of 14 recordings plus the one she put in last. If Mary adds one more recording, her Play Bay will contain the last 13 (from the group of 14), plus the two individual recordings she put in last.

In **Sequential Playback**, recordings play consecutively in the order they occurred based on begin time. In other words, the first recording plays from beginning to end; when complete, the second recording plays, etc. **Synchronized Playback** plays calls in the "real time" that they occurred.

There are three icons in the upper left corner of either Play Bay. The first simply identifies that you are in a play bay. When you launch play bay, recordings will automatically begin playing in the mode selected. Click Reload to re-start playback in the same playing order (or select a different order from the drop-down box.) Click Clear to remove all calls from your play bay. This does NOT delete any recordings; it merely removes them from your play bay.



Regardless of which playback mode you choose in Play Bay, you can't stop/start individual recordings. The only three actions you can take with an individual recording must be done on the icon bar to the right of the user and/or channel name. Press the first icon to mute a recording, the middle icon to save the recording to disk, or the X icon to remove the item from your play bay. (See [ICON KEY](#))



To close the Play Bay and return to your page of results, click the X in the far upper right corner.

The following examples explain the playback modes in your Play Bay.

EXAMPLE:

Recording A began at 1:05:08 AM and lasted for two minutes

Recording B began at 1:05:15 AM and lasted for two minutes

With both calls in your Play Bay in Synchronized Playback mode, recording A begins playing. Recording B begins playing seven seconds later (the difference between the start times when the recordings were made). Both recordings will continue playing simultaneously in their entirety, just as when originally recorded.

Since both recordings lasted exactly two minutes, recording A will end seven seconds before recording B because it began seven seconds sooner.

Synchronized Playback plays calls in the real time that they occurred (with the only EXCEPTION listed below).

EXCEPTION: Recordings can NOT be ordered in Synchronized Playback if there is a difference of 12 hours or more between the time when the oldest recording starts and the newest one starts. When that occurs, Synchronized Playback is no longer an option in the drop-down box. In that case, the recordings CAN be played in Sequential Playback. In Sequential Playback, the calls will play in the order they were actually received, with the first call on the list playing in its entirety, followed by the second call, the third call, etc.

EXAMPLE 1: John's last outbound call of the day began at 4:30:00 PM and ended at 5:00:00 PM. His next call wasn't made until the following morning at 8:00:00 AM. If these two calls are added to a Play Bay, they can't be heard in Synchronized Playback because there is more than 12 hours difference between the start times of the two calls.

EXAMPLE 2: Mike is a call center shift supervisor. Beginning at 8:00:00 AM, he selects an agent's call every hour and adds it to his Play Bay. After 15 consecutive hours, his Play Bay is full (15 calls). He can't listen to them in Synchronized Playback because the oldest call and the newest call have start times greater than 12 hours apart.

Assume that Mike deletes either the three recordings he added first or the three he added last from his Play Bay so that the remaining 12 calls have a difference in start times of less than 12 hours. He can listen to the recordings in Synchronized Playback, but the recordings are played in "real time" just like they occurred. Mike would have to listen to the first call, then leave his Play Bay open until the next call begins, which could be up to 59 minutes later if the first call only lasted one minute.

Adding a recording that includes [Screen Capture Playback](#) to your Play Bay adds only the audio portion.

Details

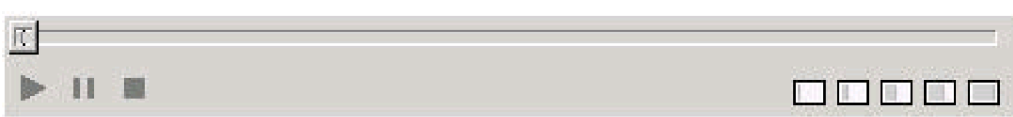
When you click the Details icon for a recording, a window on the right displays buttons that represent Details, [Notes](#), [Evaluation](#) and [Attachments](#) associated with the selected recording. At the bottom of the Details section, a Recording History lists all events that pertain to this recording.

Results 1-10 of 10.

Toolbox...

	Id	Date	Begin ▼	Length	
☐	Hess, Rita	01/20/06	04:24:34 PM	00:00:06	  
☐	Hess, Rita	01/20/06	03:01:03 PM	00:00:07	  
☐	Hess, Rita	01/20/06	02:46:03 PM	00:11:57	  
☐	Hess, Rita	01/20/06	11:17:57 AM	00:00:20	  
☐	Hess, Rita	01/20/06	11:13:34 AM	00:00:23	  
☐	Hess, Rita	01/20/06	11:00:33 AM	00:02:33	  
☐	Hess, Rita	01/20/06	10:39:26 AM	00:01:20	  
☐	Hess, Rita	01/20/06	08:46:33 AM	00:00:23	  
☐	Hess, Rita	01/19/06	04:04:39 PM	00:00:06	  
☐	Hess, Rita	01/19/06	03:19:32 PM	00:00:43	  

[jump] 10 results ▼ [previous] [next]



DETAILS **NOTES** **EVA**

 **Hess, Rita**

Date: January 20, 2006
Time: 2:46:03 PM
Length: 00:11:57
Direction: Outbound
Label: x1147

Display: EXT ANS Local 5 D
Number:
Dialed: 52332847
Track #: Add tracking number
Account:

Recording history
01/20/06 - Hess R [Recording]

DETAILS **NOTES** **EVALUATION** 

 **Hess, Rita**  

Date: January 20, 2006
Time: 2:46:03 PM
Length: 00:11:57
Direction: Outbound
Label: x1147

Recording history

01/20/06 - Hess R [Recording]

A screenshot of a web browser window. The address bar shows a URL starting with 'http://'. The page title is 'Hess, Rita'. The main content area displays a call log entry with the following details: Date: January 20, 2006; Time: 2:46:03 PM; Length: 00:11:57; Direction: Outbound; Label: x1147. There are icons for a camera, headphones, and a document in the top right corner of the browser window.



This section of details appears slightly different for CTI customers. It instead shows the LOC (life of call) data including the frequency and duration of hold(s).

Segment date:	August 03, 2005
Segment time:	11:39:28 AM
Segment length:	00:00:02
Direction:	Inbound
Label:	x0002
Call hold count:	1
Call hold time:	00:00:08
Call begin:	11:39:20 AM
Call end:	11:39:45 AM
Call length:	00:00:25

Shortcuts in the upper right corner of the details window allow authorized users to play the recording, or e-mail the recording or a link to it. (See the [ICON KEY](#) to learn about **OnviCord Web** icon functions.) The headphones icon (or computer monitor) is only available if an actual recording exists. The envelope icon is available even if the recording is not stored on the server because you can still e-mail the call details but not the actual recording.



If a recording is accompanied by [Screen Capture Playback](#), you have the option of playing just the audio (click the headphones icon) or the audio and video simultaneously (click the computer monitor icon). A gray envelope icon indicates the recording is not listed in your e-mail [Outbox](#). A yellow icon indicates it is listed in your [Outbox](#). (Adding a recording that includes [Screen Capture Playback](#) to your Outbox adds only the audio portion.)



Remember that recordings are **NOT** encrypted during the transmission from your server to your computer. If you require this level of protection, contact your system administrator about setting up a Secure Sockets Layer (SSL), a protocol for secure network communications. Instructions for establishing a Secure Sockets Layer are described in the System Setup Guide that accompanied your shipment.



On any results page in **OnviCord Web**, a headphones (or computer monitor) icon with a tiny padlock in the upper right corner indicates the recording is encrypted. While you can e-mail the details of an encrypted recording, the actual recording can NOT be sent. The play icon is only available if the recording is presently stored on the server.

If the recording still exists on the server, a user with access to the Details tab can add account information, generate a tracking number if none exists and/or add a caller name or number (inbound) if none exists by entering the information on the appropriate line and clicking Update. Users can also modify existing information in the Display, Number, and/or Account Number fields. The Dialed (outbound number) field, the Tracking Number, and the actual recording can NOT be modified by anyone.

Display:	EXT ANS Local 5 DIAL 2332847
Number:	
Dialed:	52332847
Track #:	Add tracking number
Account:	
Update Save Delete ☐	

To add a unique tracking number to this recording, click Add Tracking Number. Your screen refreshes and displays the number.

Display:	Rita Hess
Number:	3029
Dialed:	3033
Track #:	Add tracking number
Account:	B&B Machine Shop ▼

Account Information is configured by the user or system administrator. If your administrator has the Accounts list ON, use the drop-down box to select the appropriate account information you want affiliated with this recording. Once selected, the recording is automatically updated to reflect that data. With the Accounts list turned OFF or if you do not see the correct account with the accounts list turned ON, manually enter the account information on the Account line and click Update. Once entered, the information becomes an available choice in the drop-down list to the right of the Account box if the accounts list is turned on.

Account:	Bank of Commerce
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At the bottom of the Details page, click Update to reflect new/changed information such as that described above. Users with appropriate privileges can also save a recording (press Save) or delete a recording (select Delete). Privileges are assigned in the Manager application. To save a recording, click Save and select a target location and file name. When you choose to delete a recording, a warning message appears. Press OK to delete the recording or Cancel if you change your mind.



The small square icon at the right end of the row allows a user to disable the delete feature for this particular recording. A green icon indicates deletion is allowed. A red icon indicates the delete function has been disabled. Hover your cursor over the red icon to find out which user disabled the delete feature. This information will also be reflected in the [Recording History](#) section.



A user who disables the delete function for a recording can re-enable the feature by clicking the red icon and returning it to the green state. Additionally, any user with access to the person who disabled the function can re-enable the delete feature.



IMPORTANT NOTE for System Administrators: Recordings with the delete feature disabled so that they can't be deleted are left intact on the recording server during a purge.

Recording History

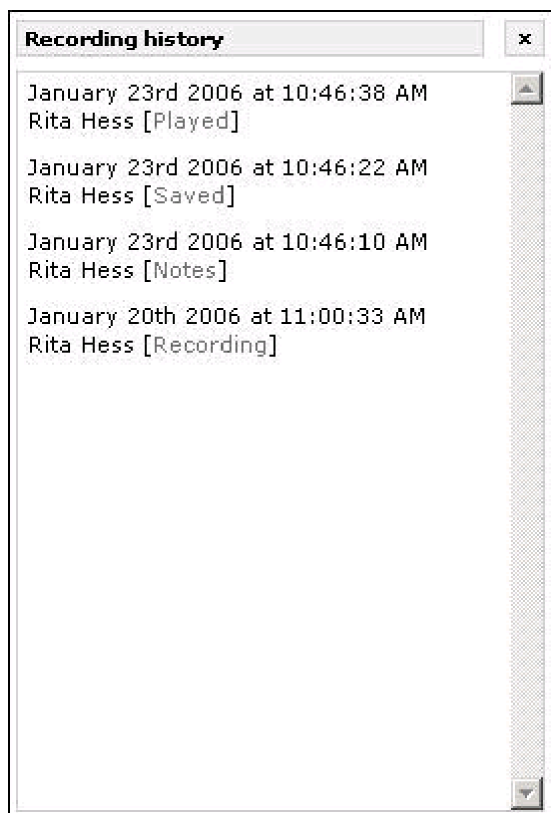
The box at the bottom of the Details page displays a Recording History (most recent event shown first) indicating who has played the call and when, who added Notes and/or Evaluations and when, etc.

It may be necessary to scroll down to see the entire recording history. You will only see names of note authors and evaluators if you have access to those users.

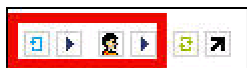
Most users see two icons to the right of the recording history. Click the first icon to refresh the recording history and display new/changed information about the recording.



The second icon launches a full view of the history (right side of screen only). Click the X to return to the normal view.



CTI users and those in a free agent environment with appropriate privileges have four additional recording history icons besides. (Privileges are assigned in the Manager application.)



These icons control "life of the recording" functions. While viewing the recording history, hover your mouse over an icon to learn its meaning or refer to the following description.

- Click the first icon to see the "life of the recording" as results. This creates a display on the left side of the screen (replacing your usual [results](#) screen) that displays the life of the recording from beginning to end, which may involve multiple users/channels, etc. Use the back button on your browser to return to your search results screen.
- Click the second icon to play the "life of recording" as it occurred.
- The third icon displays the selected user's recording(s) during the time frame (the length of the entire call).
- The fourth icon plays (in [play bay](#)) the selected user's recordings during the time frame (the length of the entire call).

The last two icons perform the same functions as on non-CTI systems: the fifth icon updates the recording history, and the last displays the recording history in full view.

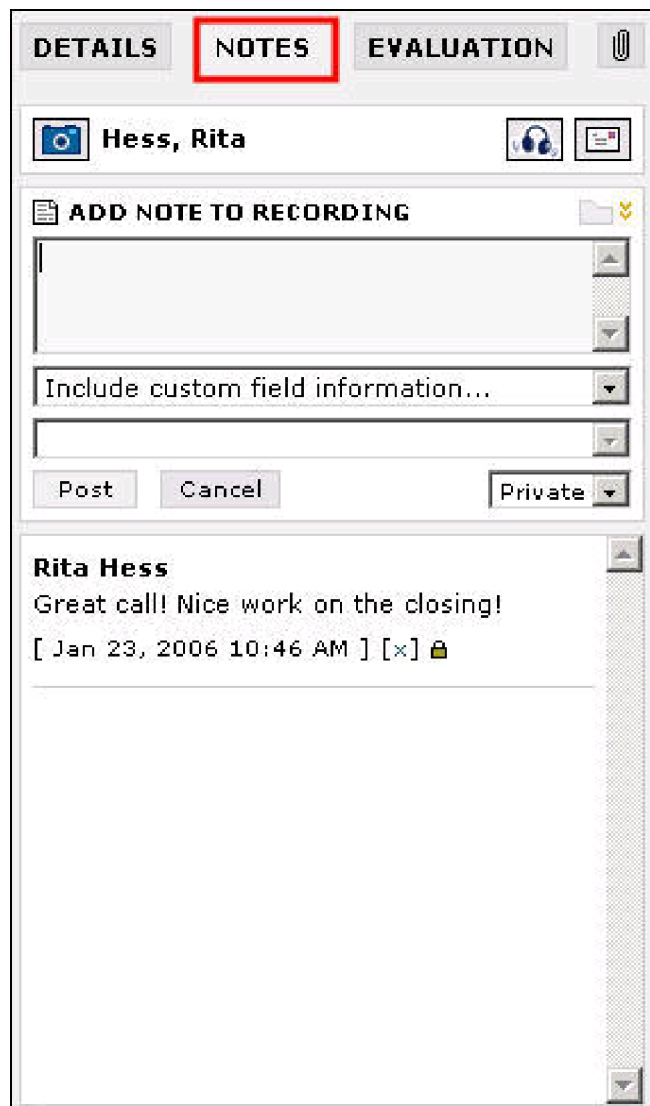
EXAMPLE: A call comes in to Jones Truck Company. The receptionist answers, handles the customer request, and hangs up. The icon does not appear.

EXAMPLE: A call comes in to Jones Truck Company. The receptionist answers and transfers the call to a sales person. The icon does appear.

EXAMPLE: A call comes in to Jones Truck Company. The receptionist answers and transfers the call to a sales person. She then answers another incoming call, handles the customer request and hangs up. The sales person transfers the call back to the receptionist. The icon does appear.

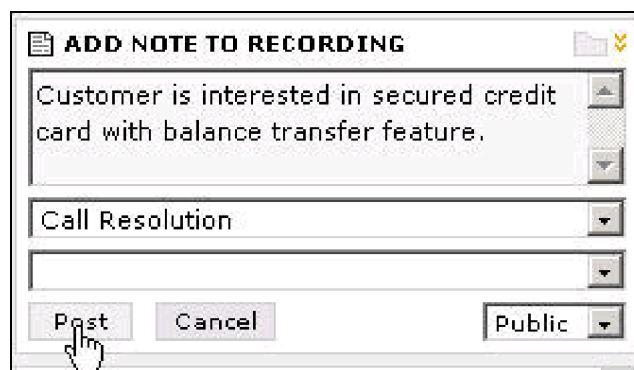
Notes

Click the Notes tab to display all notes you have permission to see for the selected recording. This section automatically includes a place for a new note, followed by existing notes with the most recent listed first.



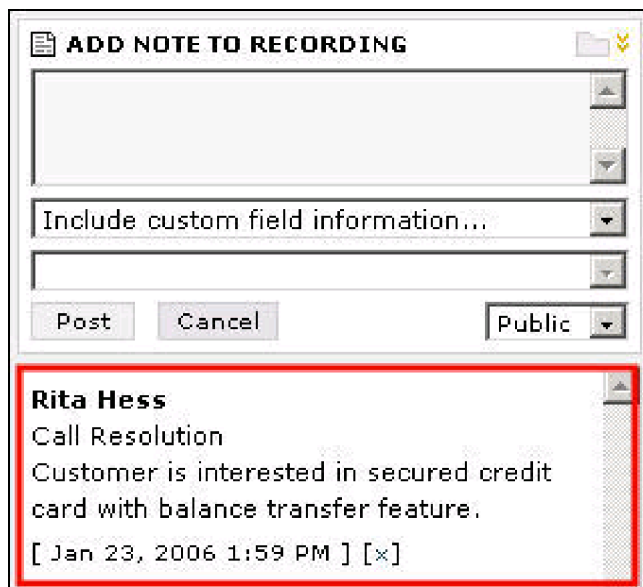
The screenshot shows a software interface with three tabs: **DETAILS**, **NOTES** (highlighted with a red box), and **EVALUATION**. Below the tabs, there is a header for **Hess, Rita** with icons for a camera, headset, and mail. The main section is titled **ADD NOTE TO RECORDING** and contains a large text input area. Below the text area is a dropdown menu labeled "Include custom field information..." and another empty dropdown menu. At the bottom of this section are buttons for **Post**, **Cancel**, and a **Private** dropdown menu. Below this is a list of notes. The first note is by **Rita Hess** and reads: "Great call! Nice work on the closing!" followed by a timestamp "[Jan 23, 2006 10:46 AM]" and a lock icon. The note list has a vertical scrollbar on the right.

Authorized users can add notes by simply typing in the text box, making the note Public or Private, and clicking the Add button. Making a note Private requires the Private Information privilege to be enabled. (Privileges are assigned in the Manager application.)



This is a close-up of the **ADD NOTE TO RECORDING** form. The text input area contains the text: "Customer is interested in secured credit card with balance transfer feature." Below the text area is a dropdown menu showing "Call Resolution". At the bottom are buttons for **Post** (with a mouse cursor pointing at it), **Cancel**, and a **Public** dropdown menu.

User information and the current date/ time are stamped onto the new note and it becomes part of the [Recording History](#) shown on the Details tab. If you do not have access to the user who posts a note, you will see the note and the date/time it was posted but not the poster's name.



ADD NOTE TO RECORDING

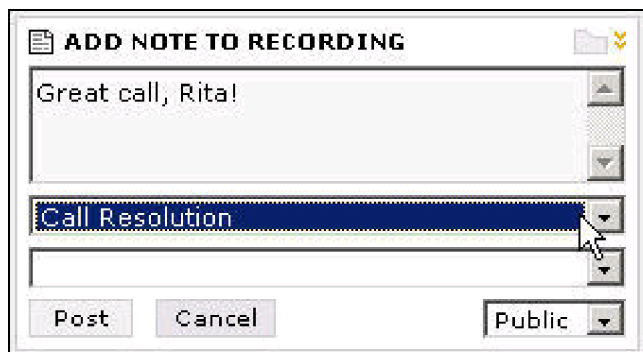
Include custom field information...

Post Cancel Public

Rita Hess
Call Resolution
Customer is interested in secured credit card with balance transfer feature.
[Jan 23, 2006 1:59 PM] [x]

In addition to (or instead of) adding a note, authorized users can associate user-defined [Custom Fields](#) to the recording. Some [custom fields](#) can only be set once for each recording (configurable by the administrator). Once any user assigns this type of custom information to the recording, no other user will see that category as a choice listed. Only the user that originally assigned the information can modify or delete it.

To add this information, use the drop-down box to select a custom field category (and choice, if available, from the second drop-down box). Make the information Public or Private and click Update. The information will then appear with that recording on any [reports](#) generated.



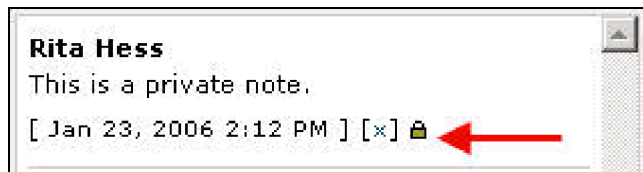
ADD NOTE TO RECORDING

Great call, Rita!

Call Resolution

Post Cancel Public

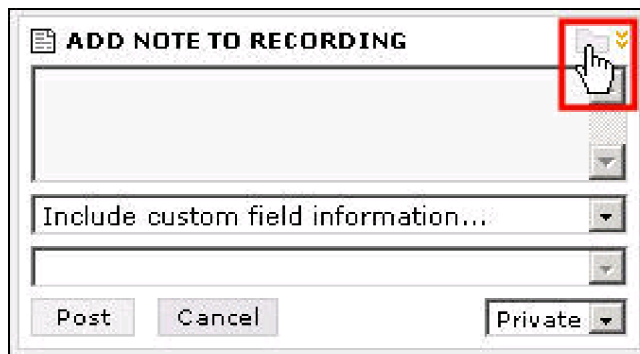
When you choose to make a note or customer information Public or Private, that choice (Public or Private) will be the default the next time you open the Notes box, but you can change it any time using the drop-down box. Access to Private notes is granted by your system administrator. Private Notes and Custom Information are denoted with a padlock.



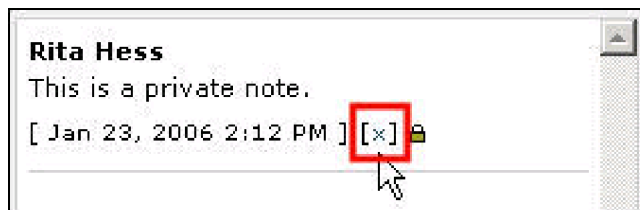
Rita Hess
This is a private note.
[Jan 23, 2006 2:12 PM] [x] 🔒

EXAMPLE: When a sales order from a new customer is called in at Brown Parts Company, the sales agent attaches a New Customer notation from the custom field information drop-down box (see [Custom Fields](#)). The agent also selects a sub-category to indicate if the new customer was a referral, cold call, or the result of a mail campaign. Optionally, each agent can attach a Note before forwarding the recording to the Advertising Director.

While in the Note section, click the small folder icon in the upper right corner to make the Note area your default instead of the [Details](#) section. Next time you click the bar code icon for a recording, the right side of the screen defaults to the Notes tab instead of Details.



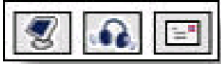
Existing notes can be deleted by clicking the small x that appears on the note if a user has the appropriate privilege . (Privileges are assigned in the Manager application.) A note can only be deleted by the user who posted the note or by the administrator.



Shortcuts in the upper right corner of the notes window allow authorized users to play the recording, or e-mail the recording or a link to it. The headphones icon (and computer monitor) is only available if an actual recording exists. Either of those icons that appear dimmed with a red X represent a file not presently stored on the server. (See the [ICON KEY](#) to learn about all **OnviCord Web** icons.) The envelope icon is available even if the recording is not stored on the server because you can still e-mail the call details (minus the actual recording). See the [ICON KEY](#) to learn about **OnviCord Web** icon functions.



If a recording is accompanied by [Screen Capture Playback](#), you have the option of playing just the audio (click the headphones icon) or the audio and video simultaneously (click the computer monitor icon). A gray envelope icon indicates the recording is not listed in your e-mail [Outbox](#). A yellow icon indicates it is listed in your [Outbox](#). (Adding a recording that includes [Screen Capture Playback](#) to your Outbox adds only the audio portion.)



Remember that recordings are NOT encrypted during the transmission from your server to your computer. If you require this level of protection, contact your system administrator about setting up a Secure Sockets Layer (SSL), a protocol for secure network communications. Instructions for establishing a Secure Sockets Layer are described in the System Setup Guide that accompanied your shipment.

A headphones icon with a tiny padlock in the upper right corner indicates the recording is encrypted. While you can e-mail the details of an encrypted recording, the actual recording can NOT be sent. If you choose to save an encrypted recording, it is saved to your chosen location non-encrypted.

Some [custom fields](#) can only be set once for each recording (configurable by the administrator). Once any user assigns this type of custom information to the recording, no other user will see that category as a choice listed. Only the user that originally assigned the information can modify or delete it.

Evaluating Calls

Evaluations are part of the OnviSource Quality Assurance Package. Please contact a sales representative for information.

This section (available only with the Quality Assurance Package) enables the use of customized evaluation forms. To configure your organization's evaluation settings, select [MANAGE Evaluations](#).

To evaluate a recording or view completed evaluations, select the recording from the list on the left and click the Evaluation tab on the right.

The screenshot shows a web interface with three tabs: 'DETAILS', 'NOTES', and 'EVALUATION'. The 'EVALUATION' tab is highlighted with a red box. Below the tabs, there is a header for 'Hess, Rita' with a camera icon and a headset icon. Underneath, there is a section titled 'EVALUATE THIS RECORDING' with a folder icon and a yellow arrow icon. This section contains two dropdown menus: 'Add new evaluation...' and 'Select existing evaluation...'.

Add an Evaluation

To add a new evaluation, select Add New Evaluation... and use the drop-down box to select the type of evaluation.

The screenshot shows a dropdown menu titled 'EVALUATE THIS RECORDING'. The menu is open, displaying a list of evaluation templates. The first two items are 'Add new evaluation...' (highlighted in blue) and 'Add new evaluation...' (highlighted in blue). Below these are several other templates: 'Billing Evaluation', 'Bryan', 'CruiseWest', 'New Eval', 'New Temp', 'New Template', 'Outbound Sales Call', 'Sample Template', 'Service Order', and 'Template 2'. A mouse cursor is pointing at the 'Billing Evaluation' option.

When you select an evaluation template from the drop-down box, the form appears. Depending on how it is configured (see [MANAGE/Evaluations](#)), questions may require more than a Yes/No response. Some may ask the evaluator to select from a numerical range (i.e., 0-5), others may include space for text, and/or some may allow for multiple responses.

The screenshot shows the evaluation form for the 'Billing Evaluation' template. The form has a header 'EVALUATE THIS RECORDING' with a folder icon and a yellow arrow icon. Below the header, there is a dropdown menu showing 'Billing Evaluation' and another dropdown menu labeled 'Select existing evaluation...'. At the bottom of the form, there is a section titled 'Opening' with a value of 'N/A' and a checkbox.

Rate the greeting
☐

☐ Excellent
☐ Good
☐ Okay
☐ Fair
☐ Poor

Comments

Questions
N/A ☐

Was the CSR competent on the call?
☐

☐ Yes
☐ No

Comments

When checked, the N/A box means the question (**OR entire category**) will not affect the score one way or the other. When you reach the last question, click Add.

Wrap Up
N/A ☐

Did the CSR thank the customer for calling?
☐

☒ Yes
☐ No

Comments

Rate overall professionalism
☒

Add Cancel

After you click Add, the Evaluation section for this recording now displays updated details indicating who evaluated this recording, the date and time it was conducted, and the overall score. Click the printer icon to print the completed evaluation. (To conceal the evaluator's name on the printed copy, uncheck the Show Evaluator box.)

DETAILS NOTES EVALUATION

Hess, Rita

EVALUATE THIS RECORDING

Add new evaluation...

Administrator - Customer Retention

Jan 31st, 2006 6:56 AM 86%

☐ Show Evaluator on printout

☒ Show Evaluator on printout

Greeting 100%

Did agent address customer by proper name? ☐

☒ Yes
☐ No

Comments

Did agent identify himself/herself? ☐

☒ Yes
☐ No

Comments

Back on the left side of your screen, the details icon (in the middle) for the selected recording has an **E** on it, which denotes that it has been evaluated.

Results 1-12 of 18. Toolbox...

	Id	Date	Begin ▼	Length	
☐	Hess, Rita	12/16/05	01:10:42 PM	00:01:21	

View an Evaluation

To view an existing evaluation, select it from the drop-down list. If the evaluation was completed by you **OR** by a user you have access to, it will show up with the evaluator's name and the template used. In this case, you can view or change the evaluation. After making the changes, scroll to the bottom of the template and click Update.

DETAILS **NOTES** **EVALUATION**

Hess, Rita

EVALUATE THIS RECORDING

Add new evaluation... ▼

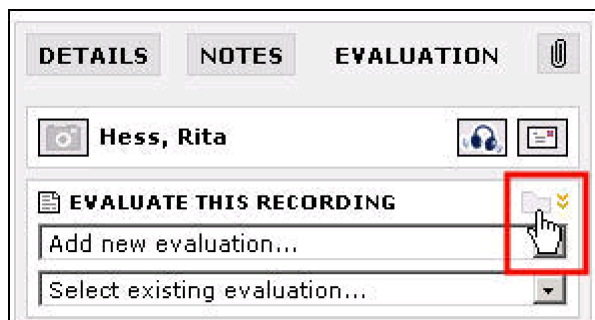
Select existing evaluation... ▼

Select existing evaluation...

Administrator - Customer Retention

If it was completed by someone other than you **OR** by someone you do not have access to, only the template name appears. The evaluator remains anonymous. In this case, you can view the template, the evaluator's input and the score, but all fields are fixed and can not be changed.

While in the Evaluation section, click the small folder icon in the upper right corner to make this area your default instead of the Details section. Next time you click the bar code icon for a recording, the right side of the screen defaults to the Evaluation tab instead of Details.



HINT: For more information on this topic, read the section titled [EVALUATE](#) (if available) or go there by selecting [EVALUATE](#) at the top of your **OnviCord Web** page.

File Attachments

Select the last tab, a paper clip icon, to:

- upload and attach one or more files to the recording, or
- attach one or more *existing* uploaded files to the recording, or
- view the existing attachment(s)

DETAILS **NOTES** **EVALUATION** 

 **Hess, Rita**  

Date: December 16, 2005
Time: 1:10:42 PM
Length: 00:01:21
Direction: Outbound
Label: Rita

Display:
Number:
Dialed:
Track #:
Account: ▼

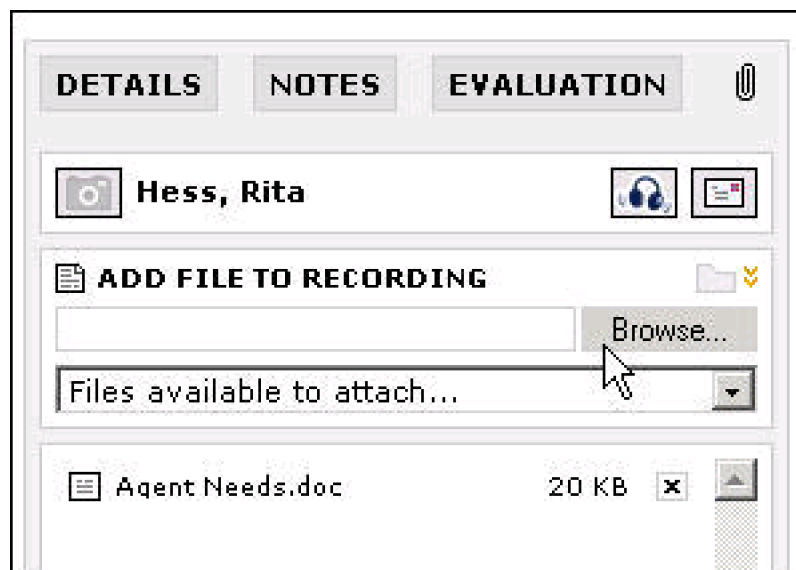


Recording history  

01/23/06 - Administrator [Account]
12/16/05 - Hess R [Recording]

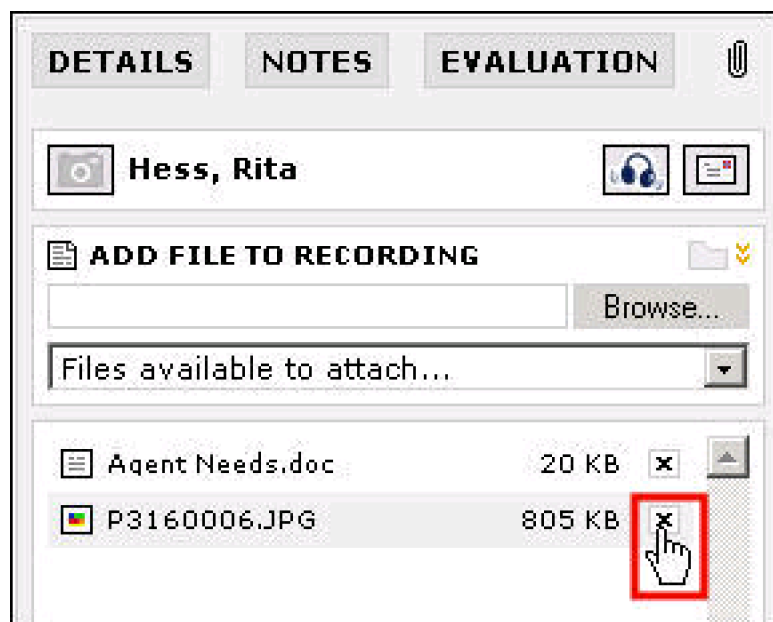
The attachments tab (a paper clip icon) displays a section for authorized users to specify a new item to be attached to the recording, followed by existing attachments with the most recent listed first.

To attach a file that has not been uploaded, use the Browse button to locate the file or enter the location in the appropriate box.



When the upload is complete, the new attachment appears on the list with an icon representing the file type, the file name and file size. Repeat the procedure to upload and attach another file to the recording. Multiple attachments are listed in alphabetical order, regardless of file type.

To delete attachments, click the X next to the unwanted Attachment. Only the user who attached the item can delete it.



To download and/or view a file that has already been attached, select it from the list of files shown in the window

(if any). Some files must be saved before viewing.

To attach a file that has already been uploaded, use the drop-down box (**Files Available to Attach**) to select the file name. Only files you have uploaded are shown as available choices. It is attached and shown with the file name and size. Repeat the procedure to attach another uploaded file to the recording.

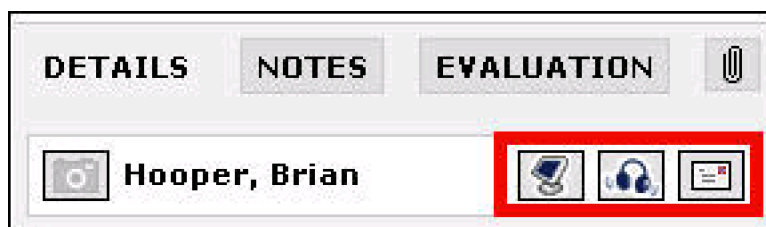


Click the small file folder icon on the right to make the Attachments area your default instead of the section.

[Details](#)



Shortcuts in the upper right corner (headphones and/or a computer monitor icon and an envelope icon) function the same as on the [Details](#), [Notes](#), and [Evaluation](#) pages for playing and sending a recording. The headphones and/or computer monitor are only available if the recording is presently stored on the server, and a tiny padlock in the upper right corner of an icon indicates an encrypted recording.



While you can e-mail the details of an encrypted recording, the actual recording can **NOT** be sent. (See the [ICON KEY](#) to learn about other **OnviCord Web** icons.) The envelope icon is available even if the recording is not stored on the server, because you can still e-mail the call details (minus the actual recording)

Email Recording

An authorized user with a valid e-mail address on the [HOME](#) page can add an item to the [OUTBOX](#) (and later e-mail it) by clicking the envelope icon next to a recording in the results list after performing a [SEARCH](#) or when viewing [RECENT RECORDINGS](#). You can also add a recording to your outbox by clicking the envelope icon in the [Playback Controller](#) section or by clicking the envelope icon in the [Details](#), [Notes](#), [Evaluations](#), or [Attachments](#) section.

When you click the envelope icon to e-mail a recording, the recording is placed in your outbox. Recordings that are placed in your outbox appear with a yellow envelope. (See [ICON KEY](#)) If an item is placed in your outbox and you change your mind, click the yellow envelope to remove the item from your outbox. For recordings with [Screen Capture Playback](#), only the audio is sent. The video can **NOT** be e-mailed.

Results 1-12 of 18.

	Id	Date	Begin	Length	
☐	Hess, Rita	12/16/05	01:10:42 PM	00:01:21	
☒	Hess, Rita	12/16/05	01:10:08 PM	00:00:05	
☐	Hess, Rita	12/16/05	09:33:11 AM	00:00:08	
☒	Hess, Rita	12/14/05	04:10:40 PM	00:00:11	
☐	Hess, Rita	12/14/05	02:55:30 PM	00:00:14	
☐	Hess, Rita	12/12/05	11:13:10 AM	00:01:01	
☒	Hess, Rita	12/12/05	11:06:41 AM	00:00:08	
☐	Hess, Rita	12/12/05	11:05:46 AM	00:00:07	
☒	Hess, Rita	12/12/05	11:05:09 AM	00:00:10	
☐	Hess, Rita	12/12/05	11:04:02 AM	00:00:24	
☒	Hess, Rita	12/12/05	10:45:00 AM	00:00:06	
☐	Hess, Rita	12/12/05	10:44:38 AM	00:00:17	

[jump] [12 results] [previous] [next]

Hess, Rita Bookmarks...

Dec 16, 2005 01:10:47 PM 128 KB 00:01:21

DETAILS **NOTES** **EVALUATION**

Hess, Rita

Date: December 16, 2005
Time: 1:10:42 PM
Length: 00:01:21
Direction: Outbound
Label: Rita

Display: Rita Hess
Number: 3029
Dialed: 3033
Track #: 4AFF548924
Account: Adams FlyAway Travel

Update Save Delete

Recording history

- 01/31/06 - Administrator [Played]
- 01/31/06 - Administrator [Evaluated]
- 01/30/06 - Administrator [Attach]
- 01/30/06 - Administrator [Attach]
- 01/23/06 - Administrator [Account]
- 12/16/05 - Hess R [Recording]

To launch your outbox while viewing a list of [RECENT RECORDINGS](#) or from the [SEARCH RESULTS](#) page, use the [Toolbox](#) drop-down list to select Launch Outbox.

Results 1-12 of 18.

	Id	Date	Begin	Length	
☐	Hess, Rita	12/16/05	01:10:42 PM	00:01:21	
☒	Hess, Rita	12/16/05	01:10:08 PM	00:00:05	
☐	Hess, Rita	12/16/05	09:33:11 AM	00:00:08	
☒	Hess, Rita	12/14/05	04:10:40 PM	00:00:11	
☐	Hess, Rita	12/14/05	02:55:30 PM	00:00:14	

Toolbox...
Export recordings
Export results
Delete this page
Launch Outbox
Launch Play bay
Play this page
Results as report
Send this page

On the left, your outbox displays areas for specifying recipients of the e-mail, entering a subject and text, viewing the details of the recording, and for specifying what will be sent and how. A list of sent items appears on the right.

Outbox - 5 recordings

SEND

To:

Subject:

Total attachment size: 251 KB

=====

Hess, Rita - December 16th, 2005 - 1:10:42 PM

=====

DETAILS

Date: December 16th, 2005

Recordings [clear]

☒	☒	Hess, Rita	12/16/05 01:10 PM	☒	☐	☐	☒	☐	☐
☒	☒	Hess, Rita	12/16/05 01:10 PM	☒	☐	☐	☒	☐	☐
☒	☒	Hess, Rita	12/12/05 11:13 AM	☒	☐	☐	☒	☐	☐
☒	☒	Hess, Rita	12/12/05 10:45 AM	☒	☐	☐	☒	☐	☐
☒	☒	Hess, Rita	10/07/05 08:16 AM	☒	☐	☐	☒	☐	☐

Sent items **1-1** of **1**

To: rita@ritahess.com 10/07/05 ☒

[previous] [next]

HINT: Add multiple recordings to your outbox by selecting Send This Page from the drop-down box in the [SEARCH RESULTS](#) window, which launches the Outbox automatically.

The upper left corner displays the number of records currently listed in your outbox.

Outbox - 5 recordings

SEND

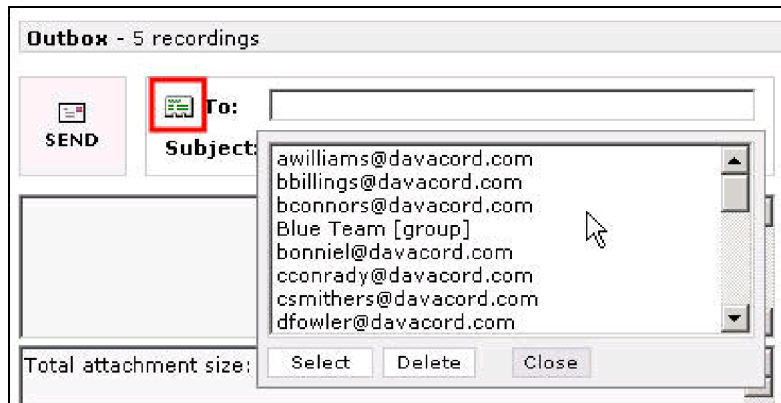
To:

Subject:

Your e-mail address, specified in Personal Settings on the [HOME](#) page, automatically appears as the sender when the recipient receives the e-mail, even though it is not shown on the page where you compose the e-mail. (This feature is unavailable for a user with no designated e-mail address or without e-mail privileges.)

Clicking the electronic business card icon next to the TO box pops open an e-mail address book. The e-mail addresses of all **OnviCord** users are shown, as well as any additional e-mail addresses you've manually entered in the address book. Select the intended recipient(s), either individuals or groups, from the list and click Select, using the scroll bar to navigate up and down the list if necessary. To add multiple recipients, select the first one you want to add, then hold down the CTRL key and select another. If you want to select multiple recipients listed together, select the first one in the series. Now hold down the SHIFT key and select the last in the series. To unselect a recipient, hold down the CTRL

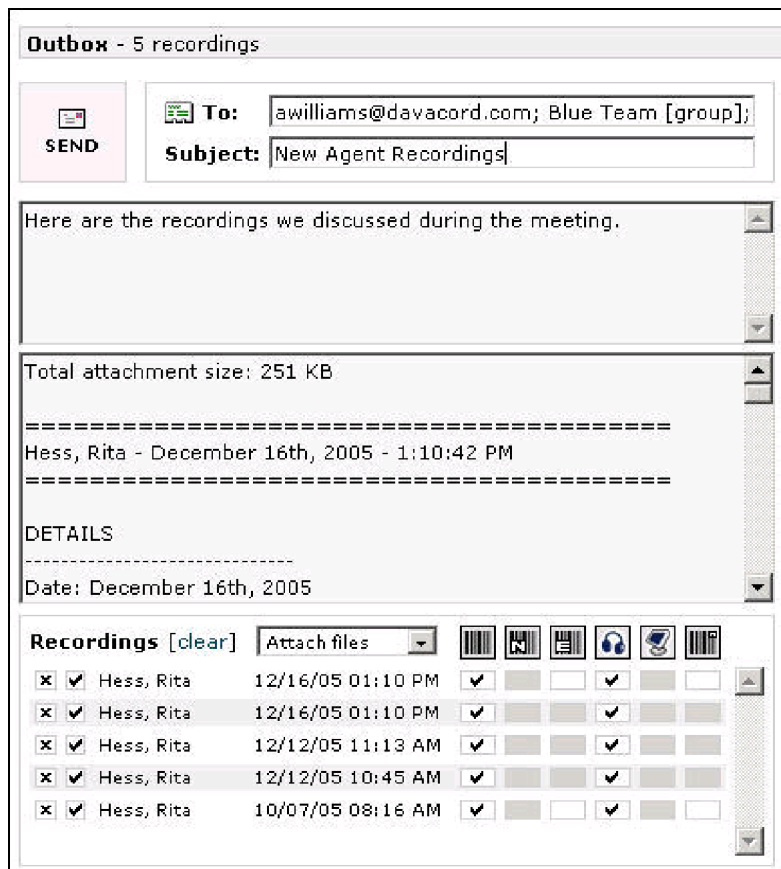
key and click on the one you want removed.



When all desired recipients are selected, click Close to close the address book.

If a recipient is not already in your **OnviCord** Internet address book, enter the person's e-mail address on the TO line. Manually entering a recipient's e-mail address adds that person to your address book when the e-mail is sent, so the recipient will subsequently appear in your drop-down list. Separate multiple manually entered addresses with a semicolon. Multiple entries selected from your Internet address book are automatically separated.

On the Subject line, enter the appropriate subject information. Type your message text (if any) in the body of the e-mail. Below that is a preview of what you are sending.



Near the bottom is a list of records you've marked to send, denoted with a checkmark. The list includes the user name and the date/time of the recording. Check or uncheck the recordings that apply to the e-mail you are about to send. (To completely remove an item from the Outbox, click the x to the left of the item.)

To the right of each recording, any item with a checkmark in the box next to it will be included in the e-mail you are about to send if it applies to that recording. By default, the audio recording is checked, as is the Details box, which means all applicable recording details (date, time, length, caller, number, dialed digits, tracking number, account number) will be sent. Put a checkmark beside each entry to check or uncheck the item(s) to include. Note that any item that does not apply to a particular recording has a box that is dimmed and may not be checked.

Recordings [clear] Attach files

☒	☒	Hess, Rita	12/16/05 01:10 PM	☒	☐	☒	☒	☐	☐
☒	☒	Hess, Rita	12/16/05 01:10 PM	☒	☐	☒	☒	☐	☐
☒	☐	Hess, Rita	12/12/05 11:13 AM	☒	☐	☐	☒	☐	☐
☒	☒	Hess, Rita	12/12/05 10:45 AM	☒	☐	☐	☒	☐	☐
☒	☒	Hess, Rita	10/07/05 08:16 AM	☒	☐	☐	☒	☐	☒

HINT: Click an icon at the top of the column to include that item in all applicable recordings. For example, to include notes for all recording that have notes, click the icon at the top of the Notes column.

Use the drop-down box to select whether to send your message via Internet as an attachment, via Internet as a compressed attachment, or via Intranet with a link to the recording. A separate link is sent for **each** recording if sending more than one; recipient(s) must click the link in their e-mail and save the recording to play it.

Recordings [clear] Attach files

- Attach files
- Compress files
- Link files

☒	☒	Hess, Rita		☐	☒	☒	☒	☐	☐
☒	☒	Hess, Rita		☐	☐	☒	☒	☐	☐
☒	☐	Hess, Rita	12/12/05 11:13 AM	☐	☐	☐	☒	☐	☐
☒	☒	Hess, Rita	12/12/05 10:45 AM	☐	☐	☐	☒	☐	☐
☒	☒	Hess, Rita	10/07/05 08:16 AM	☐	☐	☒	☒	☐	☒

When finished, click Send. A new window opens indicating whether or not the message was successfully sent. Click the X in the upper right corner to close the new window. An entry is made in your Sent Log, your Outbox closes and you are returned to the most recent task in **OnviCord Web**.

Outbox - 1 recordings

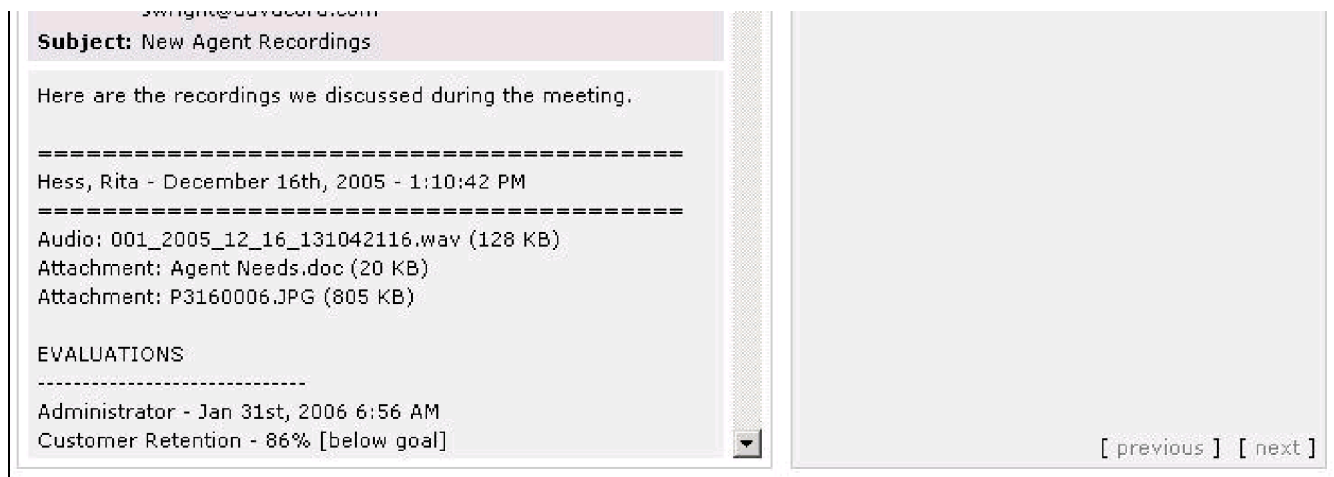
Message - New Agent Recordings

The mail has been **successfully** sent.

Sent: Tue, January 31, 2006 7:45:14 AM
From: Administrator <admin@ritahess.com>
To: awilliams@davacord.com
 bonniel@davacord.com
 csmithers@davacord.com
 bonniel@davacord.com
 sbarnes@davacord.com
 cwright@davacord.com

Sent items 1-2 of 2. [Clear items...]

To: awilliams@davacord.com, bor 01/31/06 [X]
 To: rita@ritahess.com 10/07/05 [X]

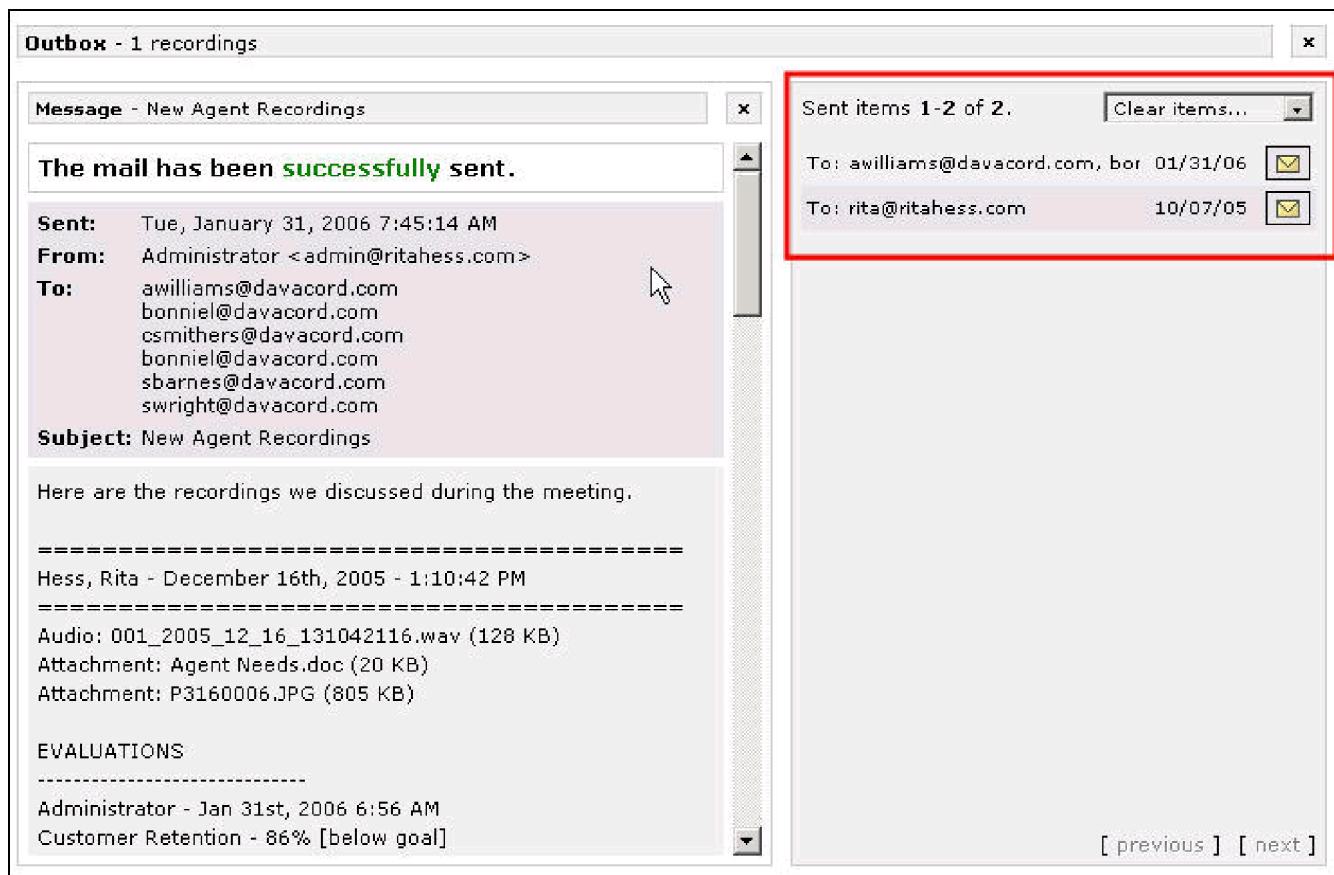


If a message fails to send, it remains in your outbox and does not attempt to re-send. You must determine the probable cause for the failure (i.e., network down). When the issue is resolved, repeat all of the above steps to send your message.

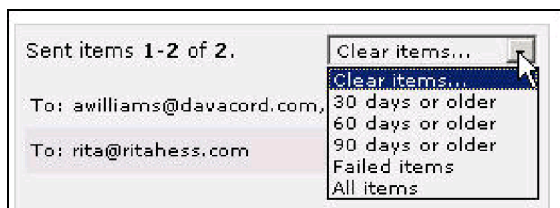
Users receiving your e-mail will see all items you selected to send. A recipient's e-mail program determines how the e-mail will look and how it treats attachments.

To clear **all** items from your Outbox (that have not been sent), click [clear]. To clear individual items, click the x next to each one.

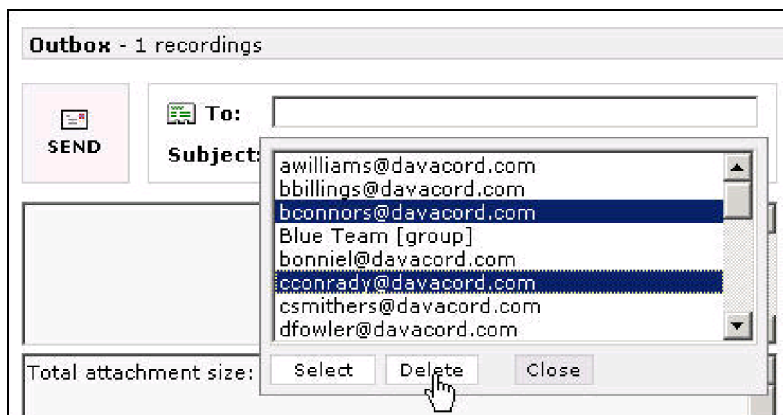
The Sent Log in your Outbox displays a list of messages you've sent. Each entry shows the recipient(s) and date sent. If more than one page of sent messages exists, use the Previous or Next button at the bottom to see the other sent messages. To read a message previously sent, click the envelope icon (on the right) of the message you want to read. Messages that failed to send are shown with a dimmed envelope and a red [x].



To remove items from your Sent log, use the Clear Items... drop-down list and make your selection.



To delete users from your e-mail address book, select the user(s) and click Delete. All **Onvicord** users are listed by default and can't be deleted.



To close your Outbox and return to the results page, click the x in the upper right corner of your Outbox.

REPORTS

The **REPORTS** section of **OnviCord Web** lets you view a report of some or all users, channels and/or groups for a specific time frame if you are authorized to view those users, channels and/or groups. To use this feature, select Reports at the top of an **OnviCord Web** page.

Home | Recent Recordings | Search | **Reports** | Evaluate | Messages | Outbox | Manage | logout | help

Users and channels

All users
Adams, Allen
Barnes, Stacia
Billings, Bob
Blackmann, Jessie

All channels
April
Daniel
Rita

Display Reset

Recording date/time range

Begin: Dec 31 2005 12:00 AM
End: Jan 31 2006 11:59 PM

Groups

Blue Team
Green Team

Recording statistics

Settings

Color [Answering machine - Blue]
Color [Black]
Color [Call after 5:00 PM CST - Brown]
Color [Customer call back - Yellow]

Length of recording

Minimum: 00 Hrs 00 Mins 00 Secs
Maximum: 00 Hrs 00 Mins 00 Secs

In the section on the left, designate the user(s) to include in the report by selecting one or more names. Existing users are listed first, then users whose accounts have been disabled are shown with an (x) and the user name. To include channels in the report, select from the box containing labeled channels, followed by those that are not labeled and not assigned.

Users and channels

All users
Adams, Allen
Barnes, Stacia
Billings, Bob
Blackmann, Jessie

All channels
April
Daniel
Rita

Display Reset

In addition to or instead of users, you can prepare a report by selecting one or more groups from the Groups section in the center.

Home | Recent Recordings | Search | **Reports** | Evaluate | Messages | Outbox | Manage | logout | help

Users and channels

All users
Adams, Allen
Barnes, Stacia
Billings, Bob
Blackmann, Jessie

All channels
April
Daniel
Rita

Display Reset

Recording date/time range

Begin: Dec 31 2005 12:00 AM
End: Jan 31 2006 11:59 PM

Groups

Blue Team
Green Team

Recording statistics

Settings

Color [Answering machine - Blue]
Color [Black]
Color [Call after 5:00 PM CST - Brown]
Color [Customer call back - Yellow]

Length of recording

Minimum: 00 Hrs 00 Mins 00 Secs
Maximum: 00 Hrs 00 Mins 00 Secs

Time: 11 59 PM

Groups

Blue Team
Green Team

Length of recording

Minimum: 00 00 00
Maximum: 00 00 00

For multiple users/channels/groups, select the first one you want to include, then hold down the CTRL key and select another. To select multiple users/channels/groups listed together, select the first one. Hold down the SHIFT key and select the last in the series. Unselect a user/channel/group by holding down the CTRL key and clicking on the one you want removed. (Only users/channels/groups you're authorized to view are displayed.)



NOTE: If you select a group to be included in a report, members of the group will be displayed in the report by user name, channel label, or channel number depending on which identification data was associated with that user or channel.

For example, if you select the Marketing group, report results will include each member of the group by user name, channel name or channel number depending on how each was set up in the User Accounts or Labels section.

The small icons to the right of the Users and Channels section provides quick access to recordings for a saved report and the last report criteria.

Recording date/time range + [icon]

Begin: Dec 31 2005 12 00 AM
End: Jan 31 2006 11 59 PM

If no icon is selected, the default beginning and ending date and time will always reflect the last 30 days. The beginning date will be one month prior to the date you are generating the report. The default beginning time is 12:00 AM (or 00:00 if display options are set to 24-hour format on your **OnviCord Web** HOME page). The default ending date is 11:59 PM of the current date.

Recording date/time range + [icon]

Begin: Dec 31 2005 12 00 AM
End: Jan 31 2006 11 59 PM

Instead of using the default report ranges, you may use the drop-down boxes to change the beginning and/or ending date and/or time to include in your report. Alternately, click on the calendar next to the beginning date (first calendar shown) and/or click on the calendar next to the ending date (second calendar shown), and select the month and day from the calendar.

Recording date/time range + -

Begin: Dec 31 2005 12:00 AM

End: Jan 31 2006 11:59 PM

Groups

- Blue Team
- Green Team

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

HINT: Call start/stop times are based on the data server clock, not the clock on your desktop or the time registered by the phone company. If you can't find a call based on when you thought it occurred, check to be sure your system clock is set correctly.

Consider synchronizing your data server clock with an atomic clock found on the Internet if precision timekeeping is critical in your organization.

Choices in the top part of the section on the right determine what will be included in your report. Each [report format](#) is explained in the next section in alphabetical order. Some report formats are limited to customers who are licensed for OnviCord's Quality Assurance Package.

- Recording statistics
- Total alerts [No line]
- Total alerts [Record fail]
- Total evaluated by user
- Total for custom fields
- Total login time [active.Agent]
- Total login time [active.Console]
- Total played by user
- Total recording time
- Total recording time by hour
- Total recordings

Your choice of report type also determines whether other choices can be made. For example, if you select Percent Recordings by Color you are given the option of choosing only certain colors. If you choose the Average Score report, you can also dictate which evaluation templates you want to see.

The following section provides a description of [report formats](#).

The subsequent section explains your options when [viewing reports](#).

Report Format

To create a report, select from users/channels/groups to be included in the report and specify a date range during which the recordings occurred. On the right, Use the drop-down box in the [REPORTS](#) section to choose your report criteria.

The interface is divided into three main sections:

- Users and channels:** Contains two lists. The first list, 'All users', includes Adams, Allen; Barnes, Stacia; Billings, Bob; and Blackmann, Jessie. The second list, 'All channels', includes April; Daniel; and Rita. Below these lists are 'Display' and 'Reset' buttons.
- Recording date/time range:** Contains date and time pickers. 'Begin' is set to Dec 31, 2005 at 12:00 AM. 'End' is set to Jan 31, 2006 at 11:59 PM.
- Groups:** A text box containing 'Blue Team' and 'Green Team'.
- REPORTS:** A drop-down menu on the right with a red border. The selected option is 'Average score'. Other visible options include 'Average score by category', 'Average score by day', 'Average score by evaluator', 'Average score by group', 'Average score by hour', 'Average score by month', 'Average score by week', 'Average score overall by day', 'Average score overall by hour', and 'Average score overall by month'.

Average Recording Length - user name, channel label, or channel number plus the average length recording made by each user or channel during the specified period.

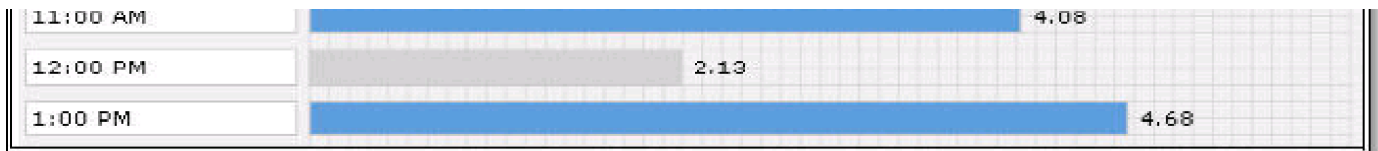
Name ▲	Average length
Ashton, Charles	00:18:03
Davis, Rita	00:11:21
Giddens, Wendy	00:10:05
Hess, Jerard	00:10:21

Average Recording Time Per Day - user name, channel label or channel number plus the number of days with activity and the average amount of recording time per day for that user or channel during the specified period. NOTE: Because the number of days is so small relative to days for other users in the example shown, only the number of days (6, 1) shows rather than the entire time frame (6 days, 1 day).

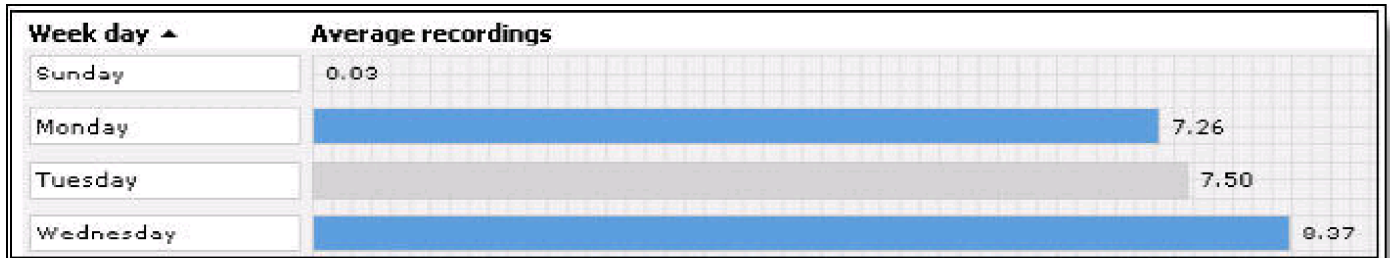
Name ▲	Average time
Ashton, Charles	34 days 01:23:55
Davis, Rita	12 day 00:11:21
Giddens, Wendy	30 days 00:22:13
Hess, Jerard	14 days 00:24:25

Average Recordings by Hour - average number of recordings per hour during the specified period shown in one hour increments.

8:00 AM	2.37
9:00 AM	4.84
10:00 AM	5.61



Average Recordings By Weekday - the average number of recordings for the selected time frame (grouped by weekday).



Average Recordings Per Day - user name, channel label, or channel number, and the average number of recordings per day made by that user or channel during the specified period.

HINT: Reports that involve scoring, such as those described below, offer a wide variety of report combinations because multiple evaluation templates can be selected for a single report.

For example, Mary makes calls for the Sales and the Accounting departments in addition to answering incoming calls as a receptionist. If three templates are designed (one for each type of call she handles) and used to score her calls, a single report can be generated to give a score of her overall performance. Her combined average score is automatically calculated for you by taking the number of times she was scored on each template and multiplying those numbers by the total possible per template. That number is then compared to the actual number of points Mary scored.

Evaluations are part of the OnviSource Quality Assurance Package. Please contact a sales representative for information.

Scoring reports are defined by the type of evaluation template(s) used to score the recording(s). When you choose a report that involves scoring, a new field appears and you must select the evaluation type(s) to include in the report.

Average score

Settings

Color [Answering machine - Blue]
Color [Black]
Color [Call after 5:00 PM CST - Brown]
Color [Customer call back - Yellow]

Evaluations

AmeriGroup Collections
Customer Retention
New Customer Signup



IMPORTANT NOTE: Most scoring reports are further delineated by the type of evaluation (a user defined field), and depending on how you configure scoring, totals may not always equal 100%. For more information, see [MANAGE Evaluations](#).

Average Score - user name, channel label or channel number, number of evaluations and average score during the specified period. (This report also shows the percentage of questions answered as N/A; if the bar doesn't show a number, there weren't any N/A questions.)

Average Score by Category - user name, channel label or channel number and average score by category during the specified period.

Average Score by Day - user name, channel label or channel number, number of evaluations and average score during the specified period.

Average Score by Evaluator - evaluator(s) name, the total number of evaluations performed by each during the specified time period and the average score awarded. This report also shows the percentage of questions answered as N/A; if the bar doesn't show a number, there weren't any N/A questions.

Average Score by Group - group name, number of evaluations and average score per group during a specified period.

Average Score by Hour - user name, channel label or channel number, number of evaluations and average score by hour for the user or channel during the specified period.

Average Score by Month - user name, channel label or channel number, number of evaluations and average score by month for the user or channel during the specified period.

Average Score by Week - user name, channel label or channel number, number of evaluations and average score by week for the user or channel during the specified period.

Average Score Overall by Day - number of evaluations and average overall score per day during the specified period.

Average Score Overall by Hour - number of evaluations and average overall score per hour during the specified period.

Average Score Overall by Month - number of evaluations and average overall score per month during the specified period.

Average Score Overall by Week - number of evaluations and average overall score per week during the specified period.

Individual Evaluation Scores - user name, score, evaluation name, evaluation date/time and call date/time during the specified recording date/time range.

Percent Answer by Question - percentage of time a given answer is chosen for a question.

Percent for Custom Field - percentage of recordings with a Custom Field (user defined) assigned to total recordings during the specified period. When choosing this report, a new selection box opens. Choose the custom field(s) to include in this report. For more information, see Custom Fields.

Percent Recordings by Color - percentage of each color (user defined meaning) assigned to total recordings during the specified period. Specify the color(s) to include in the Settings box. Otherwise, all user colors are included.

Recording Statistics - user name, channel label or channel number, and the total number of recordings, total time recorded, average length recording, average recordings per day, and average time per day recording during specified period.

Total Alerts (no line) - total number of alerts generated during the specified period due to a "no line" issue, showing channel where the issue occurred.

Total Alerts (record fail) - total number of alerts generated during the specified period due to a "record fail" issue, showing channel where the issue occurred.

Total Evaluated by User - total recordings evaluated per user during the specified time period; further delineated by the type of evaluation (user defined field).

Total for Custom Fields (configurable by administrator) - user name, channel label or channel number, and totals for each choice within the Custom Field(s) during the specified period. When choosing this report, a new box opens and you are prompted to choose the custom field(s)

to include in this report. For more information, see Custom Fields.

EXAMPLE: You establish a custom field called Credit Card to track the type of card sold to new customers. Use the first drop-down box to select Total for Custom Field. When the Custom Fields box appears, select each Credit Card choice from the list.

Make your user and time frame selections, then click Display. Your results are a chart showing a summary of credit card types sold to new customers during the specified time period for the selected user(s).

Total Login Time (Agent) - displays a chart showing total time user(s) logged in to **OnviCord Agent** during the selected time frame.

Total Login Time - displays a chart showing total time user(s) logged in during the selected time frame.

Total Played by User - lists each user/channel and the total number of recordings played by that user/channel during the specified period.

Total Recording Time - user name, channel label, or channel number and the total length of all recordings (per user/channel) made by each during the specified time.

Total Recording Time by Hour - total time spent recording each hour for the specified period displayed with a per hour total (not broken down by users, channels, or groups).

Total Recordings - user name, channel label or channel name and the total number of recordings made by each during the specified period.

Total Recordings by Hour - total recordings made by a user, channel, or group for the specified period displayed with a per hour total (not broken down by users, channels, or groups).

Total Recordings by Weekday - user name, channel label or channel name and the total number of recordings made by each on each weekday (Monday, Tuesday, etc.) during the specified period.

Total User Logins - user name, channel label or channel name and the total number of logins during the specified period.



NOTE: Your system administrator determines how long to retain login data (number of logins and last login date/time). Recordings remain on the server; only the login information is deleted. You can only view logs if your system administrator retains them that long.

User Login Statistics - user name, total number of logins on (combined) during the period, date/time of the last login, and the total login time.

User Recording Statistics - user name and a list of dates user logged in, time of first recording and last recording for each day, and daily totals displaying how long the user was logged in and how long the user recorded.

After selecting the desired report, make your selections (if applicable) in the Settings, Evaluation and/or Custom Fields sections.

With some reports, you can set a minimum and/or maximum recording length in addition to all other criteria on the Report page. A minimum call length results in recordings equal to or greater than the minimum you set. For example, if you set the minimum call length to 00:01:00 (one minute), all recordings one minute long or longer will be included in your search results.

Average recording time per day

Settings

Color [Answering machine - Blue]
Color [Black]
Color [Call after 5:00 PM CST - Brown]
Color [Customer call back - Yellow]

Length of recording

	Hrs	Mins	Secs
Minimum:	00	00	00
Maximum:	00	00	00

Save Report

To save your report criteria, make all selections on this page and click the first icon (a + sign). When prompted, enter a title for this report and click Save.

Recording date/time range + [icon]

Begin: Dec 31 2005 [calendar icon]
Time: 12 00 AM
End: Jan 31 2006 [calendar icon]
Time: 11 59 PM

Last Report

To load all previous report criteria except the date range, click the second icon. Select either your Last Report or a report you titled.

Recording range

Beginning October 6th, 2005

Ending December 16th, 2005

Recording

date/time range

Begin:

Jan

12

2006

Time:

12

00

AM

End:

Jan

12

2006

Time:

11

59

PM

EXAMPLE: Janet needs to generate a report each month using the identical criteria. The only information will change is the reporting period (the date/time range from month to month). First, she enters the static criteria (that remains the same each month) and the recording date/time range for the first period she wants to view. She runs the report and saves it as described above. The next month, Janet loads the saved report; changes the date to reflect the new time period and clicks Display.



IMPORTANT NOTE: When access to a user or channel is removed, ALL saved searches and last search criteria are lost. When granted access to additional users, saved criteria is left intact

After selecting either the last report or a saved report from the list, click Display. See [Viewing Reports](#).

Viewing Reports

After your report criteria is entered and you click Display, your report findings are shown in the bottom section of the window.

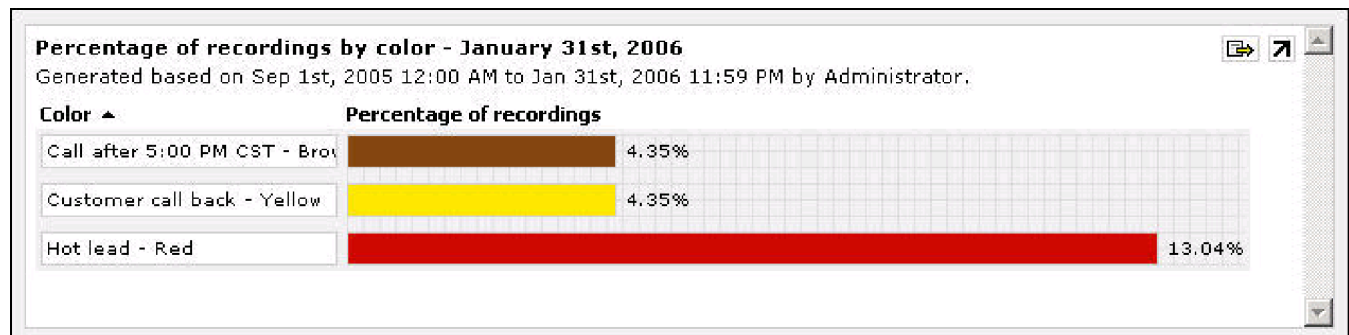
The screenshot shows a web application interface for viewing reports. At the top is a navigation bar with links: Home, Recent Recordings, Search, Reports, Evaluate, Messages, Outbox, Manage, and a logout/help link. The main area is divided into several sections:

- Users and channels:** Two dropdown menus. The first lists users: All users, Adams, Allen, Barnes, Stacia, Billings, Bob, Blackmann, Jessie. The second lists channels: All channels, April, Daniel, Rita. Below these are 'Display' and 'Reset' buttons.
- Recording date/time range:** Fields for 'Begin' (Sep 1, 2005 12:00 AM) and 'End' (Jan 31, 2006 11:59 PM).
- Groups:** A list box containing 'Blue Team' and 'Green Team'.
- Settings:** A section titled 'Percent recordings by color' with a dropdown menu. Below it, a 'Settings' box lists color codes: Color [Answering machine - Blue], Color [Black], Color [Call after 5:00 PM CST - Brown], and Color [Customer call back - Yellow].
- Length of recording:** Fields for 'Minimum' and 'Maximum' recording lengths in Hrs, Mins, and Secs, all set to 00.

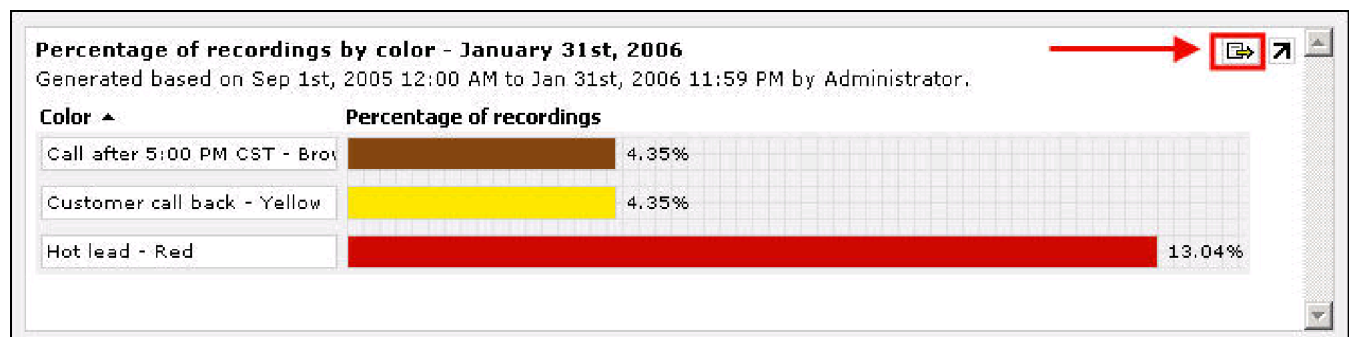
Below these sections is a report titled 'Percentage of recordings by color - January 31st, 2006'. It states it was generated based on Sep 1st, 2005 12:00 AM to Jan 31st, 2006 11:59 PM by Administrator. The report displays a bar chart with the following data:

Color	Percentage of recordings
Call after 5:00 PM CST - Brown	4.35%
Customer call back - Yellow	4.35%
Hot lead - Red	13.04%

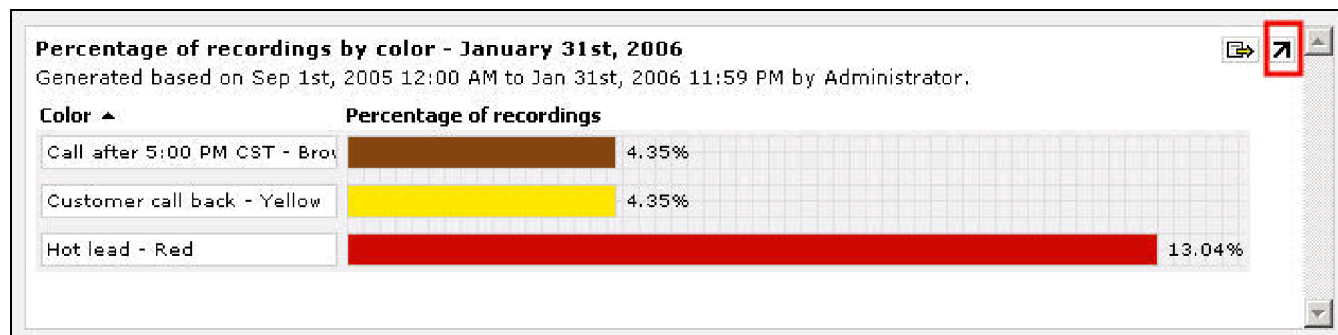
The top of each report displays the report type, date the report was generated, the date(s) and time(s) reflected in the report, and the name of the user generating the report.



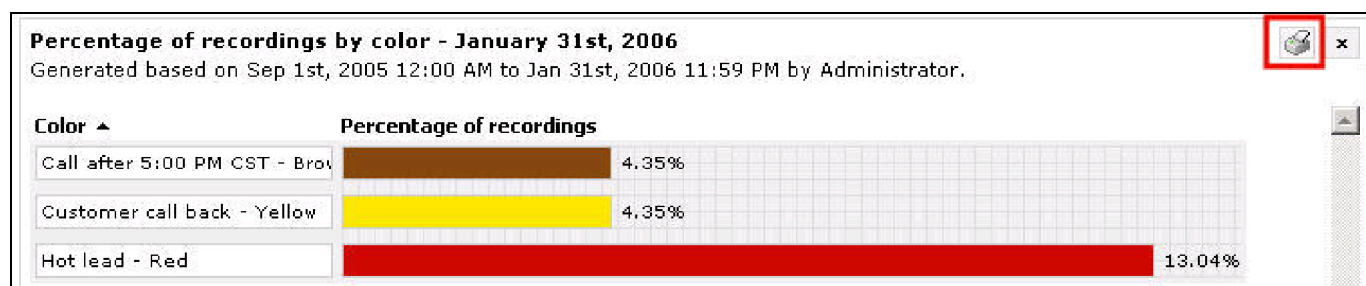
To export the report data, click the export icon. When prompted, click Save and designate a location where you want the information saved.



As in some other areas of **OnviCord Web**, the arrow icon in the upper right corner of the report area opens the Statistics Report in Full View. Most users find the Full View mode best when printing a report. (If printing from the results page rather than Full View, some information may not display.)

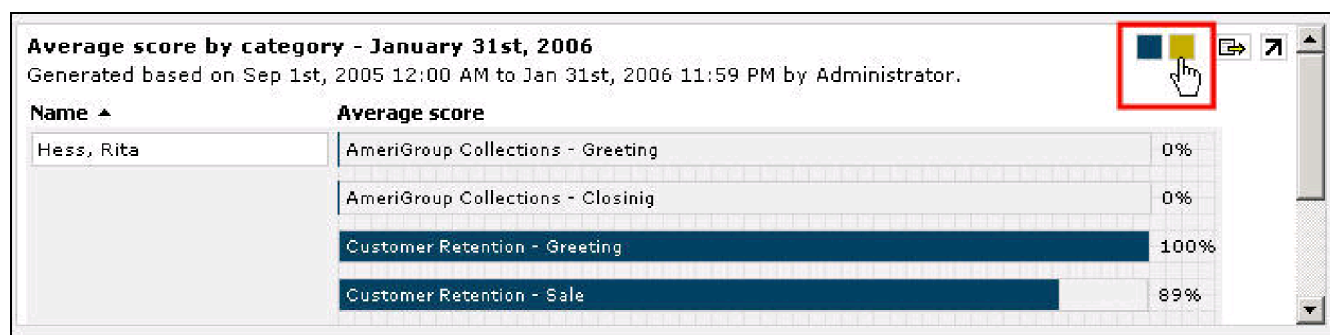


To print your report, click the printer icon in the upper right corner of the report while in full view. To close this view and return to the Reports menu, click the x in the upper right corner of the report.



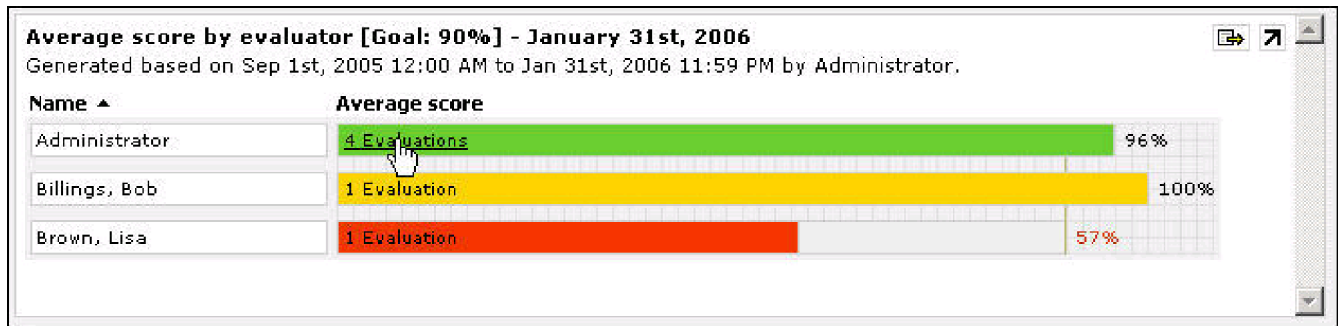
HINT: If you have difficulty printing color reports, open Internet Explorer and select Tools->Internet Options->Advanced. Scroll down to Printing. Check the Print background colors and images box and click OK.

The colored bars shown in the examples here are just a few of the many choices you can use in your reports. To change the color for the bars, complete all sections on the Report page. Click Display. When the results display in the bottom half of the window, click the small square icon to change its color. A bar appears with a range of color choices. Click the one you want to use.



In evaluation scoring reports, passing scores (or averages) are shown in green; failing scores (or averages) are shown in red. Perfect scores (or averages) are shown in yellow.

Some scoring reports include links to the actual evaluations. For example, hold your cursor over the number of evaluations shown in the Average Score column (Average Score report). The number becomes a link you can click to view the actual evaluations shown in this report.



IMPORTANT NOTE: Most scoring reports are further delineated by the type of evaluation (a user defined field), and depending on how you configure scoring, totals may not always equal 100%. For more information, see [MANAGE Evaluations](#).

Many scoring reports include links to the actual evaluations. For example, hold your cursor over the number of evaluations shown in the Average Score column (Average Score report). The number becomes a link you can click to view the actual evaluations shown in this report.

EVALUATE

With permission to Evaluate Users, you can select the **EVALUATE** tab to evaluate randomly chosen recordings within an evaluation period. (Privileges are assigned in the Manager application.) Users with permission to Evaluate Recordings are also granted access to Review Evaluations performed on recordings made by users they have access to.

The screenshot shows the 'Evaluate' tab selected in the top navigation bar. The interface is divided into two main sections: 'Recording range' and 'Evaluations'. The 'Recording range' section on the left includes a date range from 'Beginning October 6th, 2005' to 'Ending December 16th, 2005', a 'Begin evaluating' section with dropdowns for 'Jan', '31', and '2006', and two buttons: 'Evaluate' and 'Review'. The 'Evaluations' section on the right is a list box containing the text 'Customer Retention'.

Evaluate Recordings

To evaluate recordings based on the criteria for a particular template, select the template name from the list of available Evaluations on the right (if more than one exists), then click Evaluate. When selecting a template, the evaluation period automatically changes to reflect the time frame configuration for that particular evaluation (daily, weekly, monthly, or no schedule).

This screenshot is similar to the previous one but highlights the 'Evaluate' button and the 'Customer Retention' template in the 'Evaluations' list box with red rectangles. The 'Recording range' and 'Begin evaluating' sections remain the same.

When you select an evaluation template, its properties (rules) are shown on the right.

The screenshot shows the 'Evaluations' list box with 'Customer Retention' selected. To the right of the list box, the properties for this template are displayed: 'Schedule: Daily' and 'Rules: Account contains "John" Color is Hot lead - Red'.

The recording range simply shows what recordings are available. The evaluation period is configured in **OnviCord Web** by choosing [MANAGE Evaluations](#), but it is restricted to users who have the Evaluation Management privilege.

A partial screenshot showing the 'Recording range' section, which includes a date range from 'Beginning October 6th, 2005' to 'Ending December 16th, 2005'.

Recording range
 Beginning October 6th, 2005
 Ending December 16th, 2005

Begin evaluating

Sep 1 2005

Evaluate Review



NOTE: While you can't change the evaluation period (daily, one week, one month, etc.) from this page, you can use the calendar or the drop-down boxes to go back and evaluate other periods after evaluating recordings currently loaded in the queue.

For example, Jim wants to use the Customer Service template to evaluate random recordings made during July, but the template is configured to evaluate random recordings in increments of one week. Jim can't change the template to evaluate an entire month's recordings, but he can use the drop-down date boxes (or the calendar) to select which week to evaluate.

Once you choose to evaluate recordings, a random batch of calls from within the evaluation period are queued into a page that resembles the [search results](#) page.

Results **97-108** of 4,538.

Id	Date	Begin	Length	
☐ Ashton, Ch.	07/08/03	10:16:23 AM	00:01:02	
☒ Williams, Je	07/08/03	10:16:20 AM	00:01:06	
☐ Loyd, Brand	07/08/03	10:15:48 AM	00:08:20	
☐ Hess, Jerar	07/08/03	10:15:17 AM	00:00:08	
☐ x1155	07/08/03	10:15:17 AM	00:00:07	
☐ McGuire, D.	07/08/03	10:15:08 AM	00:04:37	
☒ Williams, Je	07/08/03	10:14:45 AM	00:01:32	
☐ McGuire, D.	07/08/03	10:14:37 AM	00:00:30	
☐ Jones, Kim	07/08/03	10:12:58 AM	00:00:56	
☐ x1166	07/08/03	10:07:05 AM	00:00:58	
☐ x9988	07/08/03	10:06:35 AM	00:22:43	
☒ Hess, Jerar	07/08/03	10:04:24 AM	00:01:52	

[jump] 12 results [previous] [next]

DETAILS **NOTES** **EVALUATION**

Ashton, Charles

EVALUATE THIS RECORDING

Customer Care

Select existing evaluation...

Opening N/A

Used proper greeting?

☐ Yes

☐ No

Comments

Rate the greeting

☐ Excellent

☐ Good

☐ Okay

☐ Fair

☐ Poor

Comments

Type of call

☐ Type C

☐ Type S

Evaluate each call using the form on the right half of the page. (If it is necessary to temporarily stop evaluating this group of recordings, simply log out. Any remaining calls that require an evaluation will stay in the queue.) Depending on how an evaluation is configured (see [MANAGE/Evaluations](#)), questions may require more than a Yes/No response. Some may ask the evaluator to select from a numerical range (i.e., 0-5), others may include space for text, and/or some may allow for multiple responses.

EVALUATE THIS RECORDING

Billing Evaluation

Select existing evaluation...

Opening N/A ☐

Rate the greeting ☐

☐ Excellent
☐ Good
☐ Okay
☐ Fair
☐ Poor

Comments

Questions N/A ☐

Was the CSR competent on the call? ☐

☐ Yes
☐ No

Comments

When checked, the N/A box means the question (**OR entire category**) will not affect the score one way or the other. They do not count for/against the user. Bonus questions are marked with a + sign; disqualifiers are marked with a - sign. When you reach the last question, click Add.

Wrap Up N/A ☐

Did the CSR thank the customer for calling? ☐

☒ Yes
☐ No

Comments

Rate overall professionalism ☒

Add

Cancel

After a recording is evaluated and you click Add, the recording is removed from the list on the left. A copy of the completed evaluation appears on the right showing the user who made the recording, the evaluation template used, the date/time of the evaluation, and total percentage

scored. Failing scores are shown in red. Click the printer icon to print a copy. To conceal the evaluator's name on the printed copy, uncheck the Show Evaluator box.

DETAILS **NOTES** **EVALUATION**

Hess, Rita

EVALUATE THIS RECORDING

Add new evaluation...

Administrator - Customer Retention

Jan 31st, 2006 6:56 AM **86%**

☒ Show Evaluator on printout

Greeting 100%

Did agent address customer by proper name?

☒ Yes ☐ No

Comments

Did agent identify himself/herself?

☒ Yes ☐ No

Comments

To take further action with this evaluation before moving to the next one, select the appropriate button or icon and follow the instructions for performing that operation ([Details](#), [Notes](#), [File Attachments](#), [E-mail a Recording](#)).

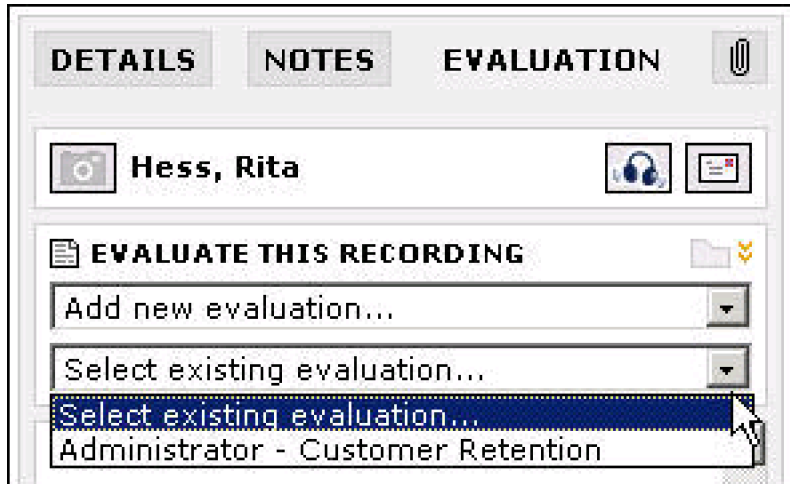
Select the next recording on the list by clicking the headphones (or computer monitor) or details [icon](#) to begin evaluating that recording.



NOTE: The evaluation queue is built as a single queue, adding all recordings to evaluate to the queue at creation time. If a user does not have access to score everything in the queue, those items the user does not have access to will remain in the queue until someone with appropriate access scores them.

Review Evaluations

To view an existing evaluation, select it from the drop-down list. If the evaluation was completed by you **OR** by a user you have access to, it will show up with the evaluator's name and the template used. In this case, you can view or change the evaluation. After making the changes, scroll to the bottom of the template and click Update.



DETAILS **NOTES** **EVALUATION**

 **Hess, Rita**  

 **EVALUATE THIS RECORDING** 

Add new evaluation... 

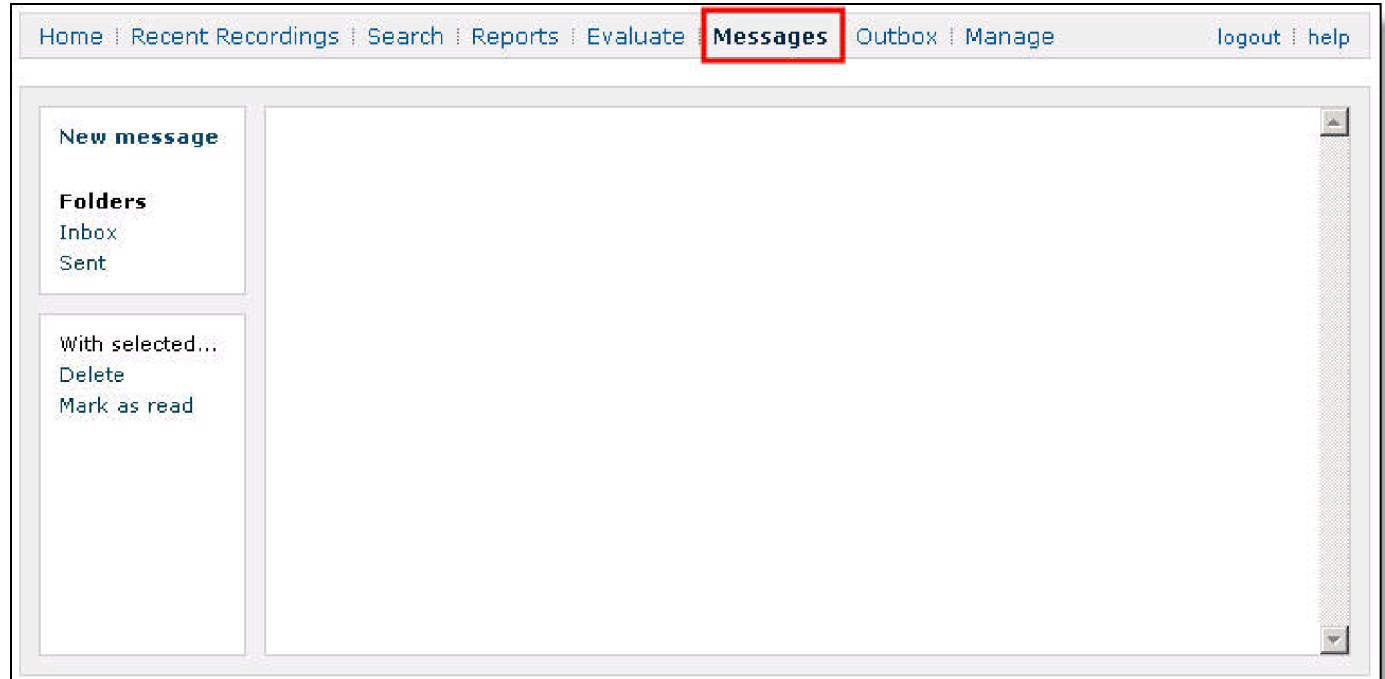
Select existing evaluation... 

Select existing evaluation... 

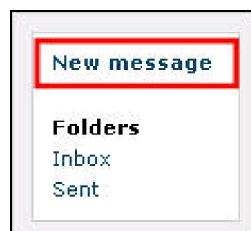
Administrator - Customer Retention

MESSAGES

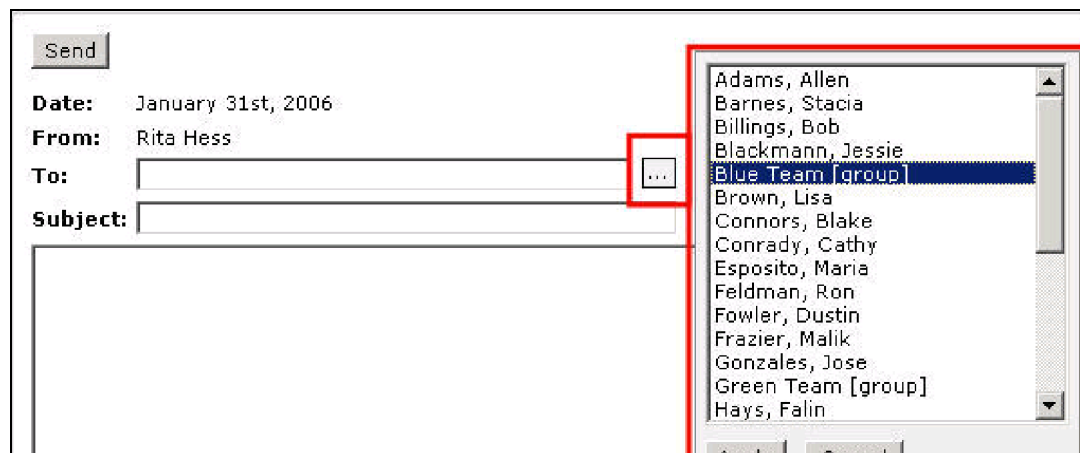
Click **MESSAGES** at the top of an **OnviCord Web** page to view/manage mail messages.



On the left, select New Message to compose a new message. A blank message appears on the right with the current date and your user name as the sender.



Click the icon at the far right of the TO line to pop a list of possible recipients in your OnviCord address book. To select a recipient, whether an individual or a group, select that item from the list. To select multiple items, select the first one, then hold down the CTRL key and select another. To select multiple items listed together, select the first one, then hold down the SHIFT key and select the last in the series. Unselect any item by holding down the CTRL key and clicking on the one you want removed. After selecting all recipients, click Apply.





Insert a subject line and text message. Click Send (in the upper left corner) to send the message.

New message

Folders

Inbox

Sent

With selected...

Delete

Mark as read

Send

Date: January 31st, 2006

From: Rita Hess

To: Blue Team [group]

Subject: Great job!

Great job on the new customer account promotion. I have a special celebration planned for Friday afternoon!

Keep up the good work!

Rita

Use the folders to view messages received (Inbox) OR messages sent (Sent) to view messages you've sent. Your selection determines what messages appear on the right. Click on the subject line to view a message.

New message

Folders

Inbox

Sent

☐	To	Subject	Sent
☒	Hess, Rita	Friday Afternoon	Jan 31, 2006 2:05:25 PM
☒	Blue Team [group]	Great job!	Jan 31, 2006 2:02:46 PM

Use the < and > keys to review the previous or next messages. To reply to a message or delete it after viewing, select Reply or Delete.

New message

Folders

Inbox

Sent

With selected...

Delete

Mark as read

< > Reply Delete

Date: January 31st, 2006

From: Jones, Bill

To: Hess, Rita

Subject: Friday afternoon celebration

Please join us at 2:00 Friday afternoon in the break room for a short celebration in honor of the Blue Team. They surpassed all of their goals in last week's promotion.

See you then!

Bill



When replying to a message, enter your text reply and click Send.

New message

Folders
Inbox
Sent

With selected...
Delete
Mark as read

Send

Date: January 31st, 2006
From: Rita Hess
To: Jones, Bill
Subject: RE: Friday afternoon celebration

Great! I'll be there! Thanks!

Rita

-----Original Message-----
Please join us at 2:00 Friday afternoon in the break room for a short celebration in honor of the Blue Team. They surpassed all of their goals in last week's promotion.

See you then!

To delete messages or mark them as read while viewing the contents of a folder (in this case, the Sent folder), place a checkmark in the box next to those messages you want to delete or mark as read. With the message(s) selected by placing a checkmark next to each, click Delete to delete the selected messages **OR** click Mark as Read to mark the selected messages as read.

New message

Folders
Inbox
Sent

With selected...
Delete
Mark as read

☐	To	Subject	Sent
☒	Jones, Bill	RE: Friday afternoon celebrati	Jan 31, 2006 2:12:43 PM
☒	Hess, Rita	Friday Afternoon	Jan 31, 2006 2:05:25 PM
☐	Blue Team [group]	Great job!	Jan 31, 2006 2:02:46 PM

HINT: Re-arrange the messages in the Inbox or Sent folders by clicking the column headers. The up/down arrows indicates which column the information is sorted by, and the arrow direction indicates whether the information is sorted in ascending or descending order.

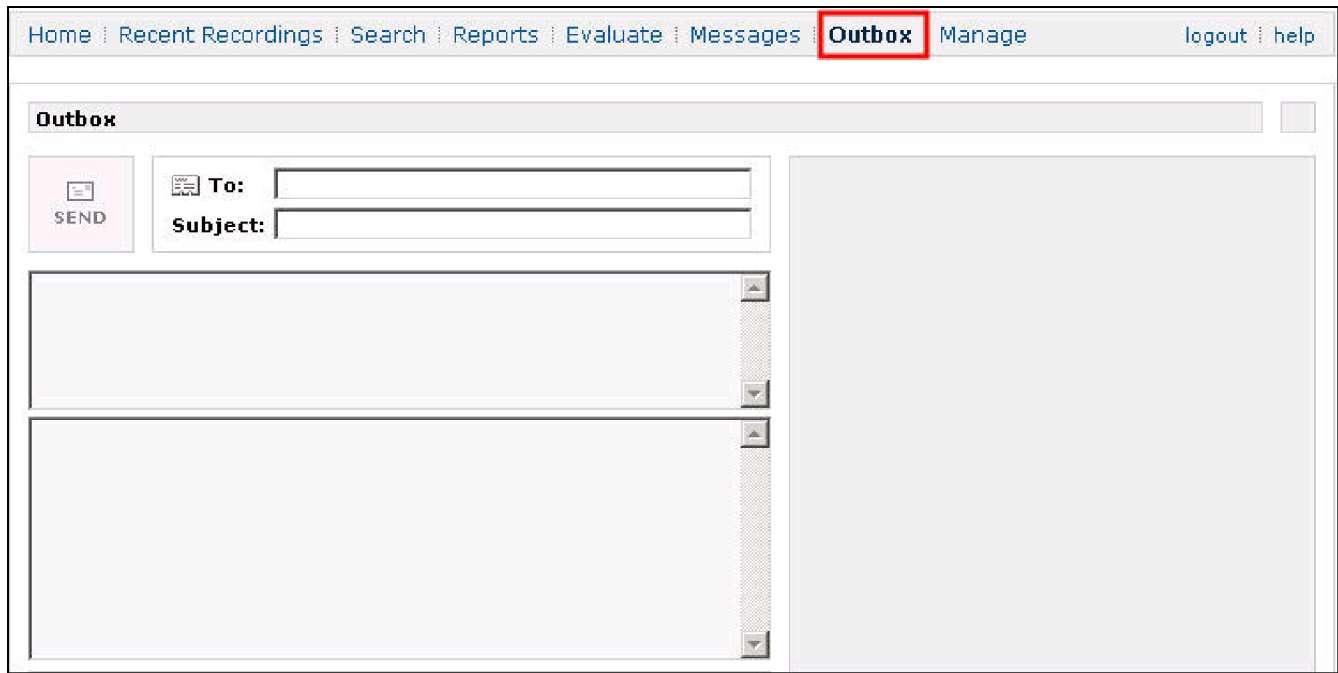
Column headers in the inbox are: From / Subject / Date.

Column headers in the sent box are: To / Subject / Date.

HINT: To send a recording with a message, locate the recording using the SEARCH or RECENT RECORDINGS feature. Add the recording to your OUTBOX and send it from there.

OUTBOX

Click **OUTBOX** at the top of an **OnviCord Web** page to launch your Outbox. Here you can configure e-mails and send recordings and/or recording details that you've marked for send. Only users with the Save and Send privilege enabled have access to the Outbox feature. Privileges are configured in the Manager application.



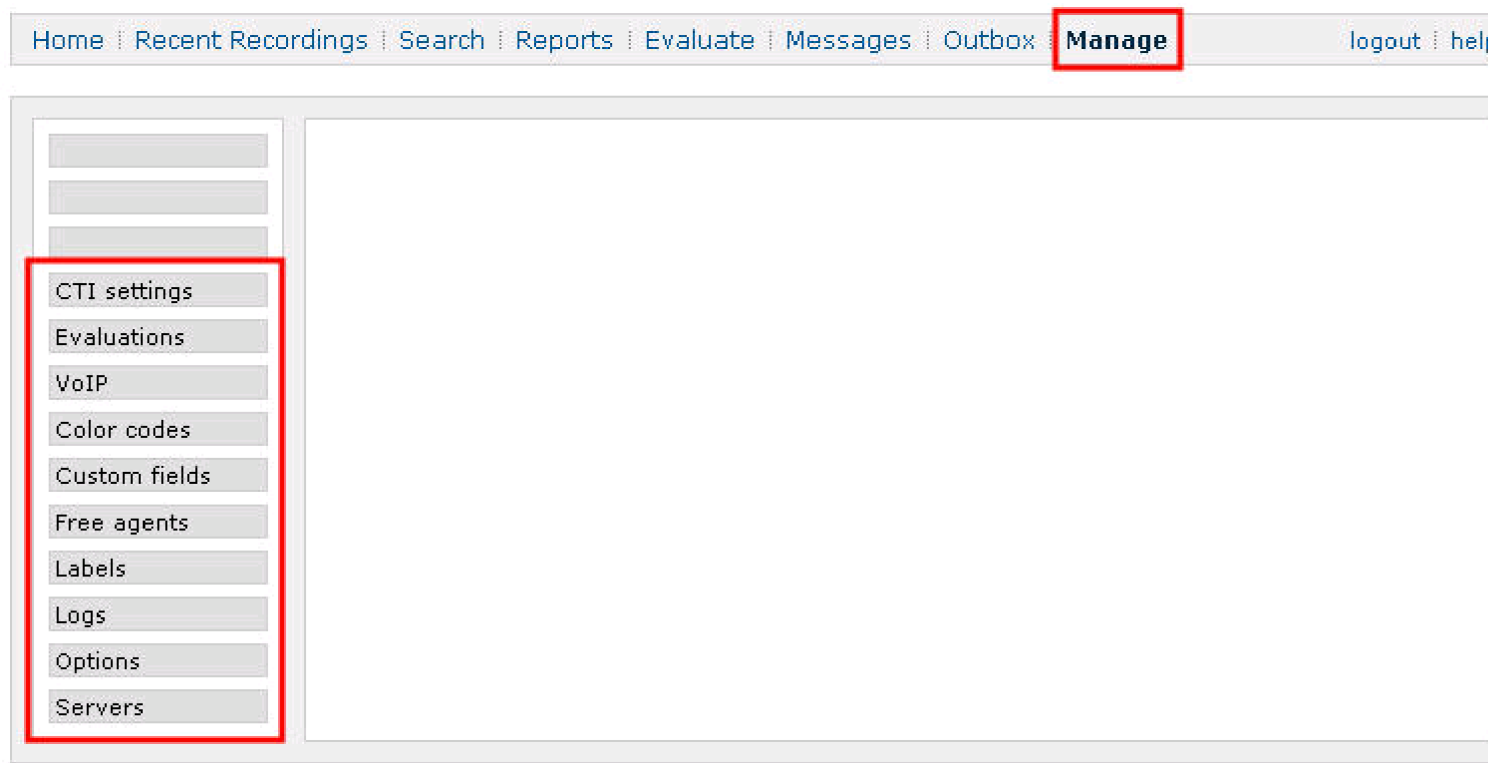
The screenshot shows the OnviCord Web application's Outbox interface. At the top is a navigation bar with links: Home, Recent Recordings, Search, Reports, Evaluate, Messages, **Outbox** (highlighted with a red box), and Manage. On the far right of the navigation bar are links for logout and help. Below the navigation bar is the Outbox section, which has a title bar labeled "Outbox". On the left side of the Outbox section is a "SEND" button with an envelope icon. To the right of the button are two input fields: "To:" and "Subject:". Below these fields are two large, empty rectangular boxes for composing the email body. On the right side of the Outbox section is a large, empty rectangular area, likely for a preview or additional information.

For information on using your outbox, read the [E-mail a Recording](#) section.

MANAGE

Access to the **MANAGE** section of **OnviCord Web** is normally limited to supervisors, IT administrators or network managers. Use these tools to configure CTI (if applicable), evaluation templates (if licensed), color codes, custom fields, free agents, labels, logs, options and servers.

Evaluations are part of the OnviSource Quality Assurance Package. Please contact a sales representative for information.



NOTE: We recommend using a single account for people who manage user or system settings.

For example, you may be the only person in your organization who will be adding or modifying accounts. Janie, on the other hand, is the IT Supervisor and needs occasional access to server options.

Use the default `admin` account that when making changes. But for "everyday" use, create separate user accounts for you and for Janie.

CTI

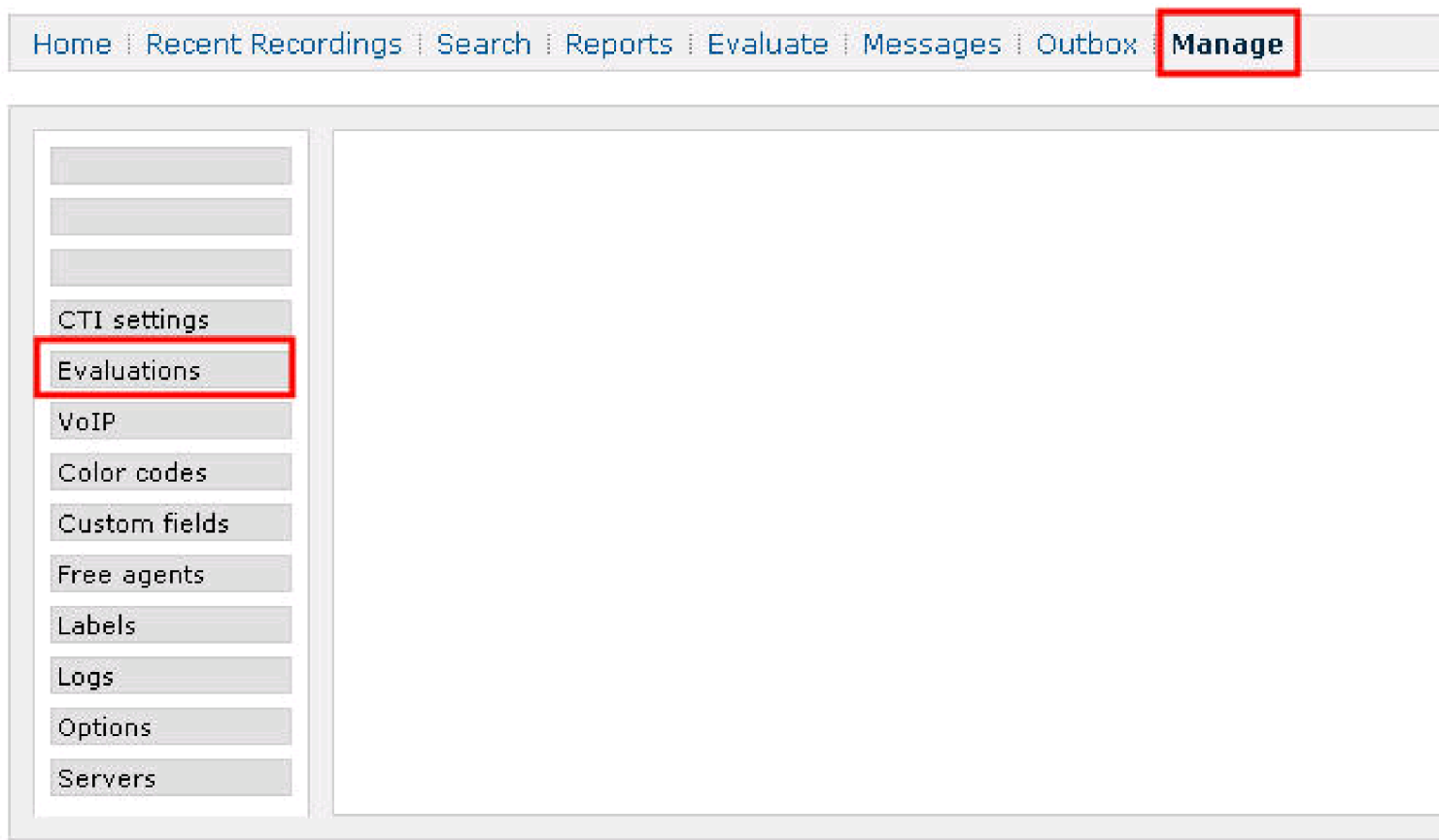
This section only applies to systems with CTI. Non-CTI users will not see this option.

For instructions on configuring CTI settings, refer to the appropriate documentation in the Install Documents section on the **OnviCord** Software Suite CD.

Evaluations

Evaluations are part of the OnviSource Quality Assurance Package. Please contact a sales representative for information.

To configure your organization's evaluation settings, select [MANAGE](#) Evaluations.



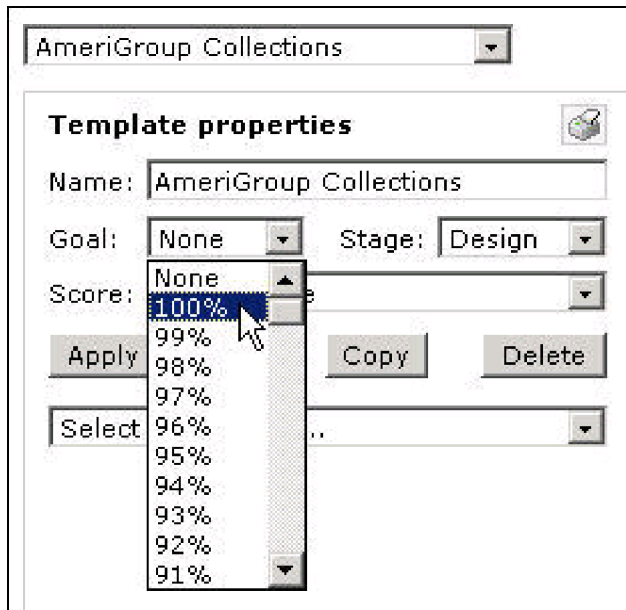
Create New Evaluation Template

To create a new evaluation template, enter the name of the template in the Name box. Click Add Template.



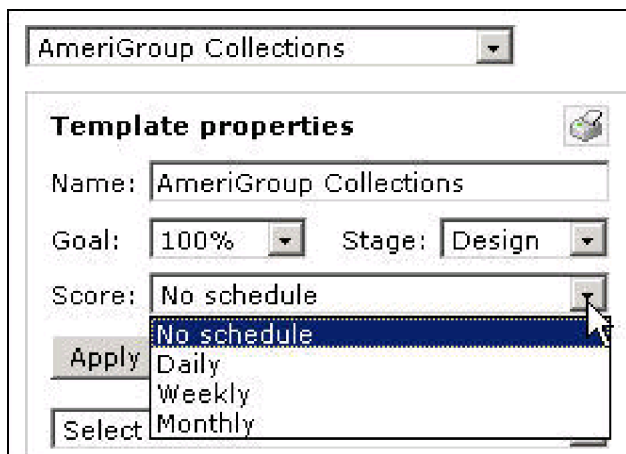


Use the drop-down box to select a Goal Score for this template. (Goal Score can be filled in later if you are unsure.)

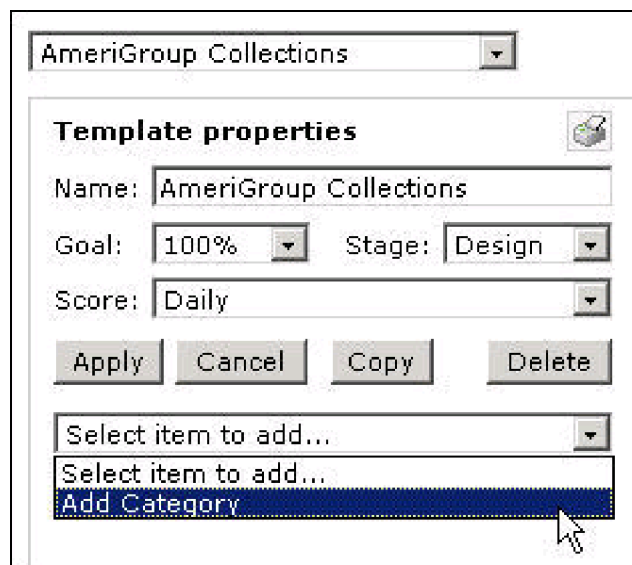


The Design stage box simply means this template can still be modified. Once a template is Live, questions and scoring configuration can't be modified.

If you will later use this template to randomly [EVALUATE](#) recordings, use the Score drop-down box to specify the random scoring criteria. (See [Rules](#))



Using the Select Item to Add... drop-down box, select Add Category.



AmeriGroup Collections

Template properties

Name: AmeriGroup Collections

Goal: 100% Stage: Design

Score: Daily

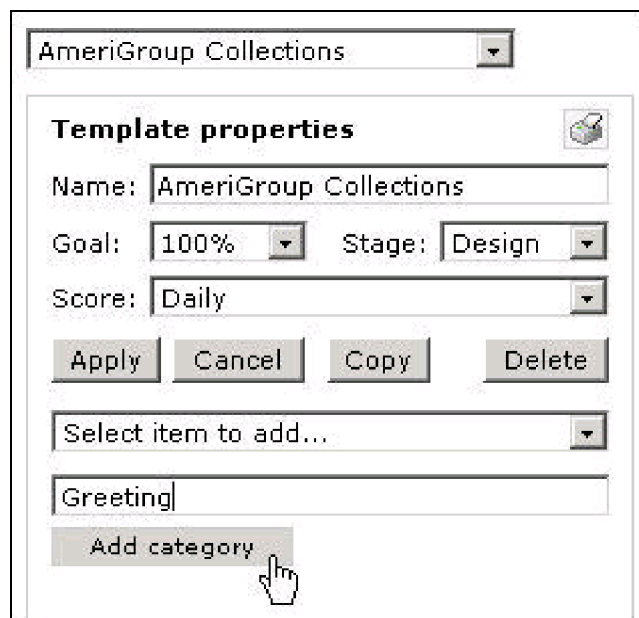
Apply Cancel Copy Delete

Select item to add...

Select item to add...

Add Category

Enter the type of category you wish to add. Click Add Category.



AmeriGroup Collections

Template properties

Name: AmeriGroup Collections

Goal: 100% Stage: Design

Score: Daily

Apply Cancel Copy Delete

Select item to add...

Greeting

Add category

Your new category is shown on the right.



AmeriGroup Collections

Template properties

Name: AmeriGroup Collections

Greeting [edit] x

Goal: 100% Stage: Design

Score: Daily

Apply Cancel Copy Delete

Select item to add...

Name

Add category

Now use the Select Item to Add... drop-down box and select Add Question.

AmeriGroup Collections

Template properties

Name: AmeriGroup Collections

Goal: 100% Stage: Design

Score: Daily

Apply Cancel Copy Delete

Select item to add...

Select item to add...

Add Category

Add Question

Add Question [Bonus]

Add Question [Disqualifier]

On the resulting screen, enter your questions in the text box. For example, "Did agent identify himself/herself?" Using the Select type... drop-down list, choose the type of answer for this question.

Template properties

Name: AmeriGroup Collections

Goal: 100% Stage: Design

Score: Daily

Apply Cancel Copy Delete

Select item to add...

Select item to add...

Add Category

Add Question

Add Question [Bonus]

Add Question [Disqualifier]

Did agent identify himself/herself?

Select type...

- Select type...
- One answer [Yes/No]
- One answer [Poor - Excellent]
- One answer [Custom]
- Multiple answer [Custom]
- Ranged answer

For all answers except Custom, use the next drop-down list to assign a point value to the answer. For custom answers, skip this step.

Select item to add...

Did agent identify himself/herself?

One answer [Yes/No] 4

Select category...

Add question

- 4
- 5
- 6
- 7
- 8
- 9
- 10
- 11
- 12
- 13
- 14

Finally, select the appropriate category for this question from the drop-down list and click Add Question.

Template properties

Name: AmeriGroup Collections

Goal: 100% Stage: Design

Score: Daily

Apply Cancel Copy Delete

Select item to add...

Did agent identify himself/herself?

One answer [Yes/No] 7

Select category...

Select category...

Greeting

Custom Answers

After adding a question with custom answers, click **[+] Add Answer** for that question on the right side of the screen.

The screenshot shows two panels. The left panel, titled 'Template properties', contains fields for Name (AmeriGroup Collections), Goal (None), Stage (Design), and Score (No schedule). It also has buttons for Apply, Cancel, Copy, and Delete. Below these is a dropdown menu labeled 'Select item to add...' with 'Text' selected. Further down, there is a 'Multiple answer [Custom]' dropdown, which is highlighted by a red arrow pointing to the 'Add answer' button in the right panel. The right panel, titled 'Greeting', shows a question 'Did agent identify himself/herself?' with options [x] [007] Yes and [x] [000] No. Below this, another question 'Did agent say "Good Morning/Afternoon"?' is shown with a red box around it and the 'Add answer' button highlighted by a mouse cursor.

Back on the left side of the screen, use the Text line to add your custom answer. Select a point value for this answer from the drop-down list, then click Add Answer. Repeat the process to add as many custom answers as necessary for this question.

This screenshot shows the 'Template properties' panel on the left side of the screen. The 'Text' field is filled with 'Yes, but incorrectly'. The 'Did agent say "Good Morning/Afternoon"' dropdown is selected. The '2' is entered in the point value dropdown. The 'Add answer' button is highlighted by a mouse cursor.

Enter as many questions as necessary for evaluating this category, including Bonus and Disqualifier questions. All categories and questions will be listed on the right, with a running total (percentage and points) for each category on this template.



NOTE: Bonus questions don't count toward total score. The value of a disqualifier question must be a negative number.

If entering a disqualifier value, simply enter the value in the point box. The value of a disqualifier question must be a negative number. If disqualifier is more than the total points for the template, you will see a warning to proceed or cancel.

The order in which the categories and questions appear now are the same order in which they'll appear to future evaluators. Use the icons to move categories and/or questions within categories up/down. Category names and questions can be changed using the appropriate [\[edit\]](#) button. Only the question text can be changed, **NOT** the type of question, category, or point value.

Greeting [edit] [v] [x] [100%] 7/7 points

[x] [↑] [↓] [edit] Did agent identify himself/herself?

[x] [007] Yes

[x] [000] No

Closing [edit] [↑] [↓] [x] [0%] 0/7 points

At any time during the design stage or after a template is designated as live, click the printer icon to print the template.

AmeriGroup Collections

Template properties [Printer icon]

Name: AmeriGroup Collections

Goal: None Stage: Design

Score: No schedule

Design
Live

Apply Cancel Copy Delete

Select item to add...

Name

Add category

When you are certain your template design is finished, use the Status drop-down box to change this template from the Design stage to Live, meaning it is complete and ready to use. Once a template is designated as Live, the questions and scoring configuration can't be modified.

AmeriGroup Collections

Template properties

Name: AmeriGroup Collections

Goal: None Stage: Design

Score: No schedule

Design
Live

Apply Cancel Copy Delete

Select item to add...

Name

Add category

To delete a template, select Delete from the Template Properties section.

Customer Retention

Template properties

Name: Customer Retention

Goal: 90% Stage: Live

Score: No schedule

Apply Cancel Copy Delete

Select item to add...

Name

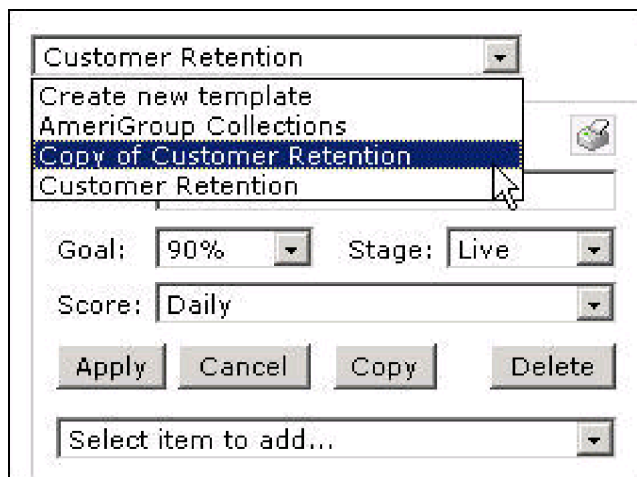
Add category



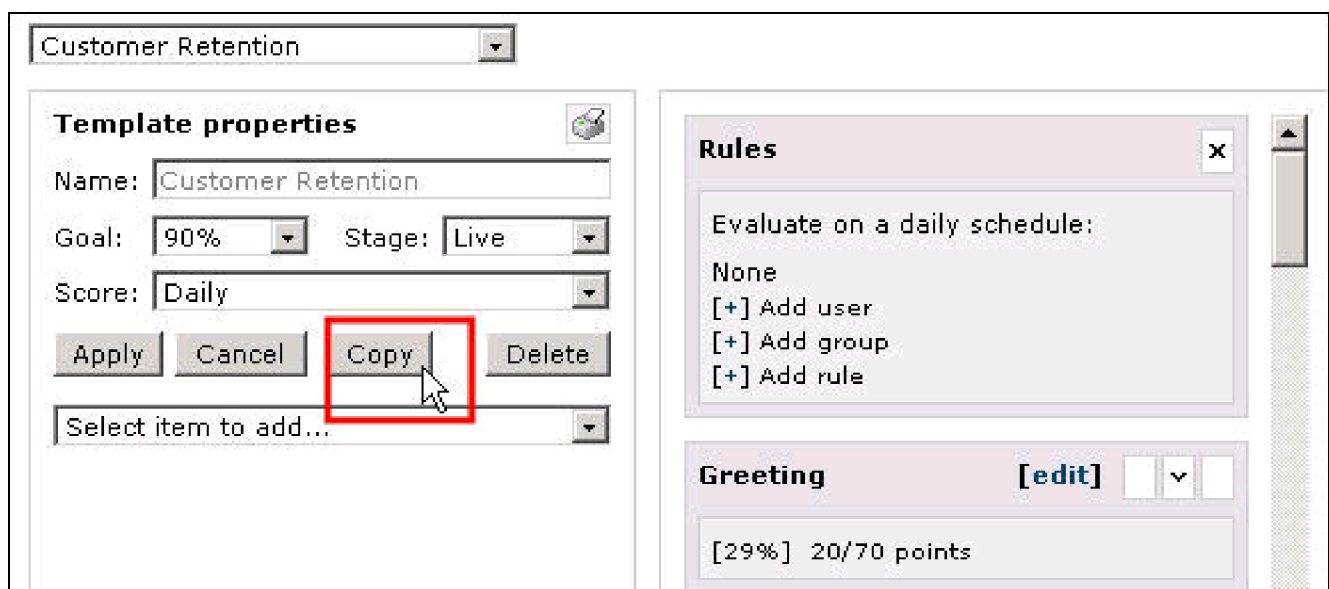
CAUTION: Deleting a template also deletes any user evaluations created with that template. Instead, consider setting a template to retired. Retired templates can be made Live later if necessary.

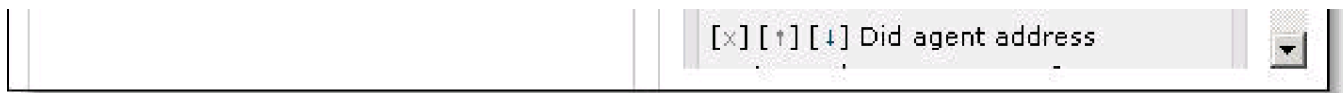
Copy Evaluation Template

If a new template is similar to an existing one, use the Copy feature to make setup quick and easy. Select **MANAGE Evaluations**. Use the **Select Template to Modify** drop-down list to select the existing template you wish to copy.



The original template appears on the right. Now click **Copy**.





The new template is named "Copy of... (original template name)" and defaults to the Design stage. You can make changes to the copy by adding, deleting and/or modifying categories and questions.

A screenshot of the 'Template properties' dialog box. The dialog box has a title bar with a close button. The title is 'Copy of Customer Retention'. Below the title bar, there is a section titled 'Template properties' with a small icon. The properties are: Name: 'Copy of Customer Retention', Goal: '90%', Stage: 'Design', and Score: 'Daily'. At the bottom of the dialog box, there are four buttons: 'Apply', 'Cancel', 'Copy', and 'Delete'. Below these buttons is a dropdown menu labeled 'Select item to add...'. The dialog box is styled with a light gray background and a white border.

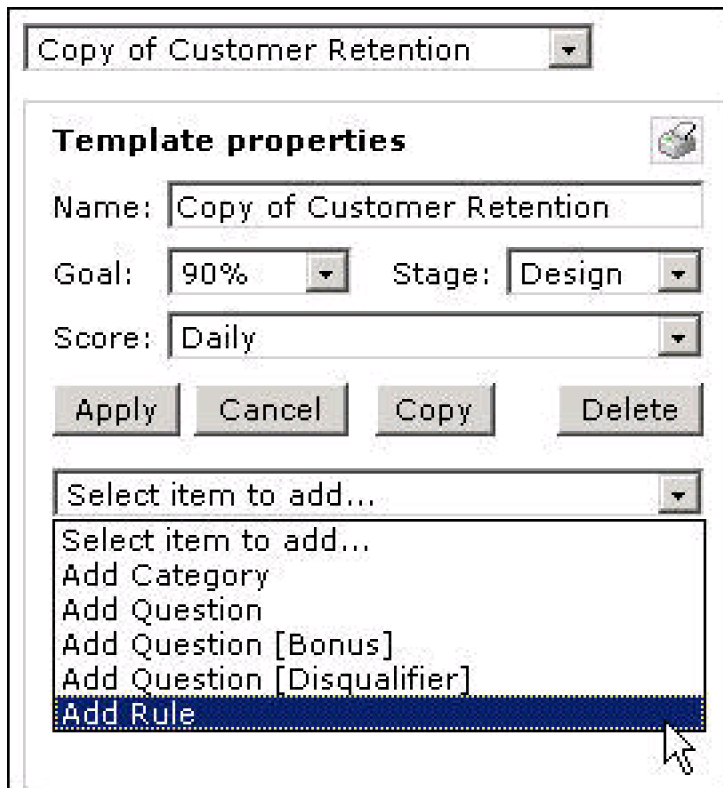
Templates can be created in several sessions. In other words, you may start a template one day, add to it another day, and finish it yet another day. A templates may continue to be modified **in the Design stage**. Once you change it to Live, no further changes can be made.

Rules

This section explains how to configure evaluation rules in the design stage of an evaluation template.

If you chose to evaluate random recordings with a template on a daily, weekly or monthly basis, you must set Rules for how the random recordings are selected. You can add an unlimited number of rules for each template.

Use the Select Item to Add... drop-down list and choose Add Rule.



Copy of Customer Retention ▼

Template properties 

Name: Copy of Customer Retention

Goal: 90% ▼ Stage: Design ▼

Score: Daily ▼

Apply Cancel Copy Delete

Select item to add... ▼

- Select item to add...
- Add Category
- Add Question
- Add Question [Bonus]
- Add Question [Disqualifier]
- Add Rule**

When the Select Rule... section appears, use the drop-down box to designate the type of rule you are creating. Your choice here determines what type of other information you will be prompted to enter. You can narrow random recordings by account, caller number, color code, dialed digits, direction, display, group, length, recording (audio or video) and/or user. Also, wildcards can be used when creating rules. When all information is entered, click Add Rule.



Copy of Customer Retention ▼

Template properties 

Name: Copy of Customer Retention

Goal: 90% Stage: Design

Score: Daily

Apply Cancel Copy Delete

Select item to add...

Select rule...

- Select rule...
- Account
- Caller number
- Color code
- Dialed digits
- Direction
- Display
- Group
- Length
- Recording
- User

For example, Jim named a template American Finance and set it to score daily. From the rule list, he selected 'group' and specified the Blue Team. When prompted, Jim entered 25% of recordings. This means that 25% of all recordings made by the Blue Team each day will be randomly placed into an evaluation queue using the American Finance template.

American Finance

Template properties

Name: American Finance

Goal: 85% Stage: Design

Score: Daily

Apply Cancel Copy Delete

Select item to add...

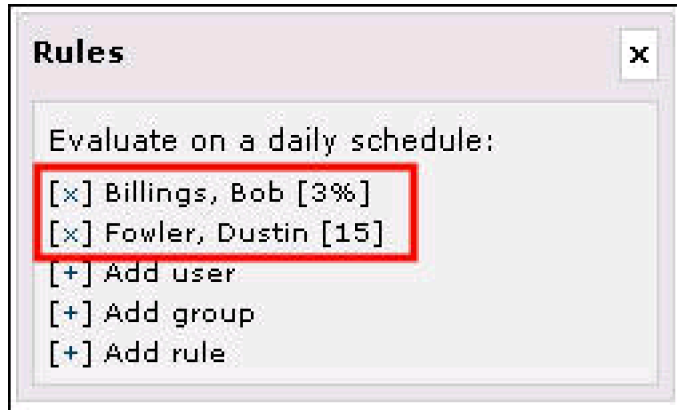
Group

25% of recordings

Blue Team

Add rule

Complex evaluation options can also be configured, such as setting users to different percentages for the evaluation period (day, week, month) and setting other users to a fixed number of recordings during the period.

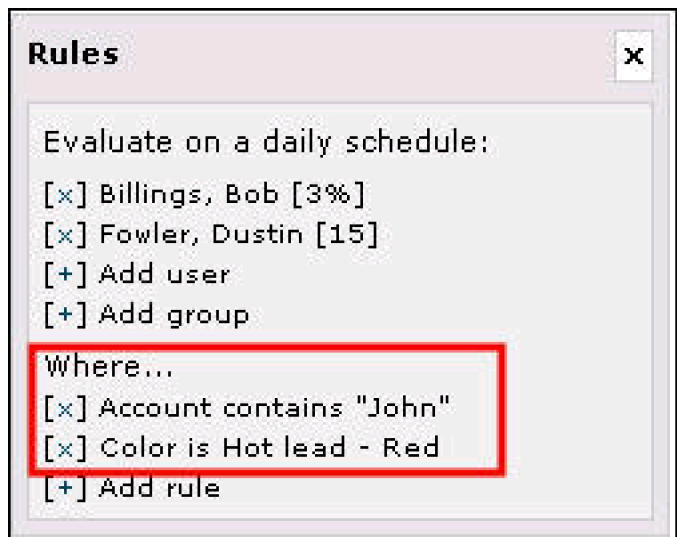


Rules x

Evaluate on a daily schedule:

- ☒ Billings, Bob [3%]
- ☒ Fowler, Dustin [15]
- ☐ Add user
- ☐ Add group
- ☐ Add rule

Rules can be compounded to create unique selection criteria. For example, you can choose only recordings where an account that contains the word "John" is affiliated with the recording **AND** the recording has been color coded to signal a hot lead (red), etc.



Rules x

Evaluate on a daily schedule:

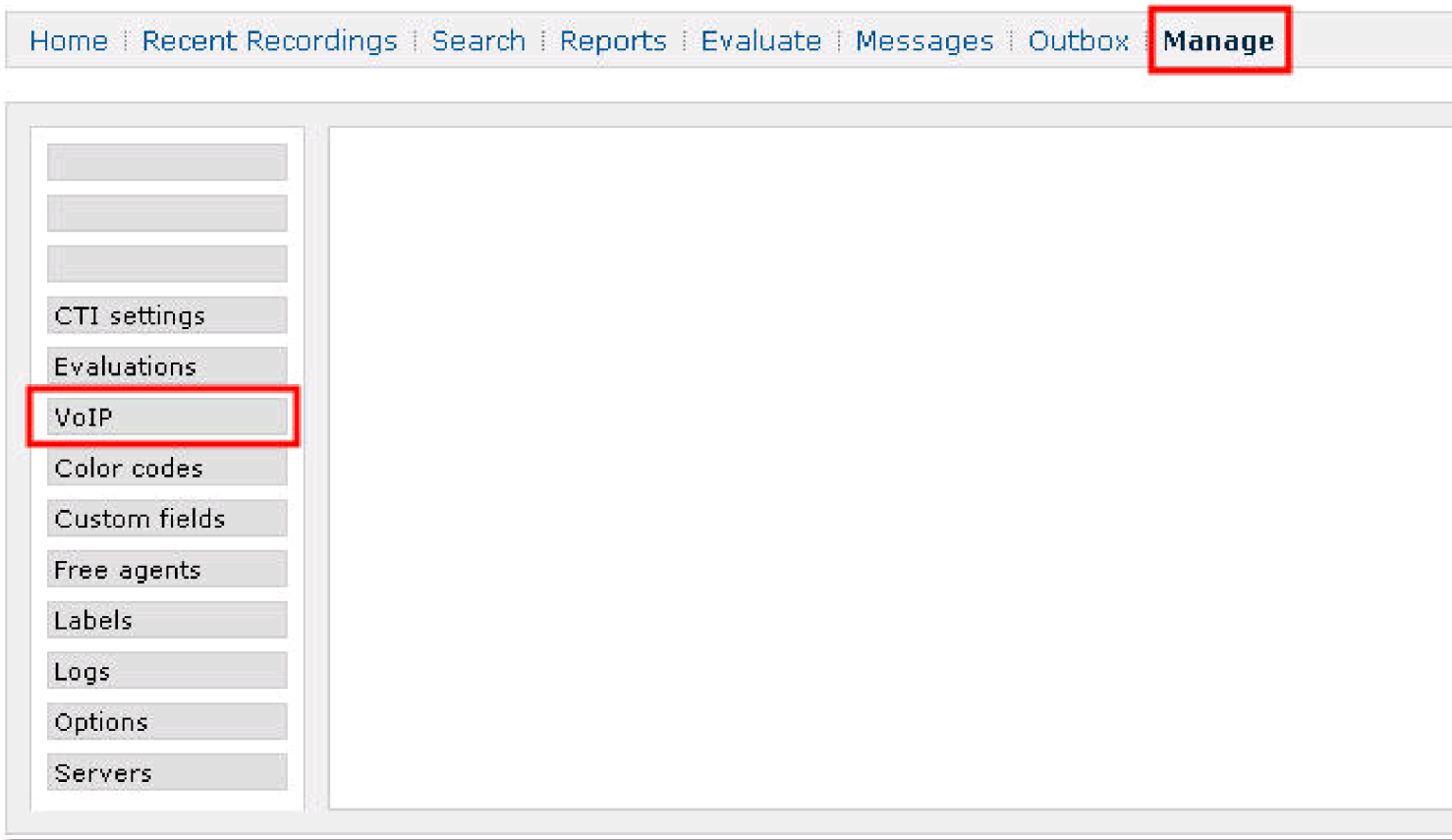
- ☒ Billings, Bob [3%]
- ☒ Fowler, Dustin [15]
- ☐ Add user
- ☐ Add group
- Where...
- ☒ Account contains "John"
- ☒ Color is Hot lead - Red
- ☐ Add rule

At any time during the design stage or after a template is designated as live, click the printer icon to print the template.

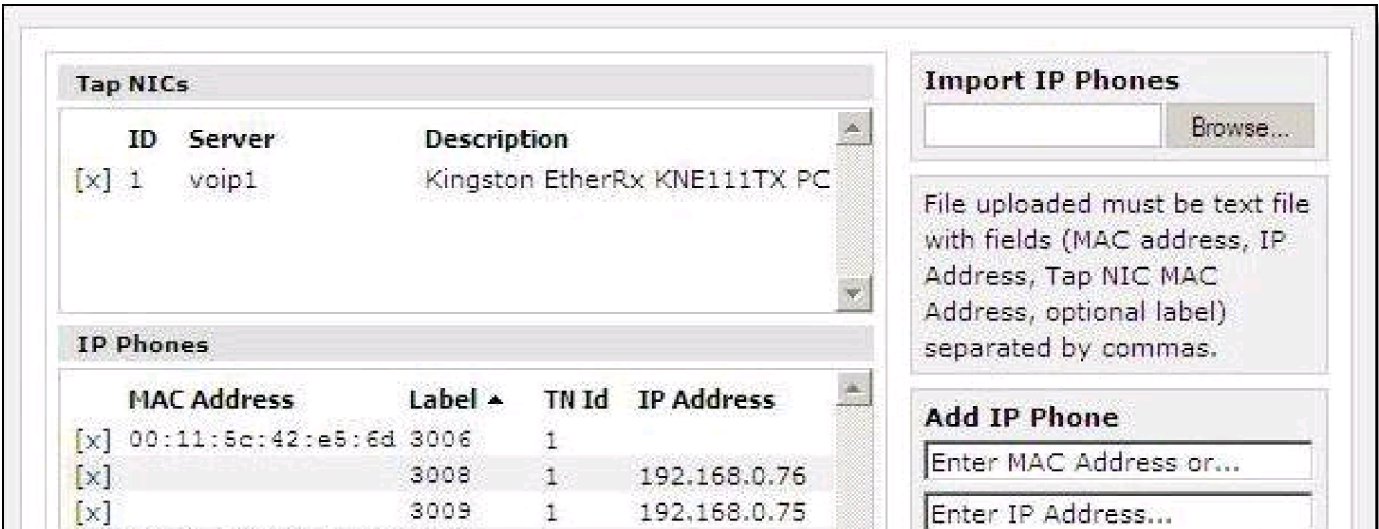
Templates can be created in several sessions. In other words, you may start a template one day, add to it another day, and finish it yet another day. A templates may continue to be modified **in the Design stage**. Once you change it to Live, no further changes can be made.

VoIP

To manage VoIP information (if applicable), select VoIP from the [Manage](#) menu.



The VoIP section lists existing tap NICs and MAC/IP addresses and allows authorized users to import or manually add and/or configure existing ones.



[x] 00:0e:d7:59:5b:d5 3016 1	Select Tap NIC ID...
Update Recording Server	Enter Label...
	Add

The top section lists existing tap NICs and shows the affiliated recording server, MAC/IP address and a user-defined description of the server.

Tap NICs			
ID	Server	Description	
[x] 1	voip1	Kingston EtherRx KNE111TX PC	

IP Phones				
	MAC Address	Label ▲	TN Id	IP Address
[x]	00:11:5c:42:e5:6d	3006	1	
[x]		3008	1	192.168.0.76
[x]		3009	1	192.168.0.75
[x]	00:0e:d7:59:5b:d5	3016	1	

To delete a Tap NIC that has been physically removed from a server, click the [x] to the left of the server name.

Tap NICs			
ID	Server	Description	
[x] 1	voip1	Kingston EtherRx KNE111TX PC	

IP Phones				
	MAC Address	Label ▲	TN Id	IP Address
[x]	00:11:5c:42:e5:6d	3006	1	
[x]		3008	1	192.168.0.76
[x]		3009	1	192.168.0.75
[x]	00:0e:d7:59:5b:d5	3016	1	

Update Recording Server

To import additional MAC/IP addresses, click Browse in the Import IP Phones section on the right. The file uploaded must be a text file with fields (MAC address, IP Address, Tap NIC MAC Address, Protocol and optional label) separated by commas. Currently the only viable protocol codes are 1 (for Cisco) and 2 (for RTP Only). Choose RTP Only for all non-Cisco switches. If you do not assign a label, the MAC address will be used as the default label.

The Import function can also be used to **update** MAC/IP addresses in situations where you have a large number of changes. If changes are made to the imported file for labels, Tap NICs, and/or protocols, they are updated. MAC addresses are not.

Tap NICs

ID	Server	Description
[x] 1	voip1	Kingston EtherRx KNE111TX PC

IP Phones

MAC Address	Label ▲	TN Id	IP Address
[x] 00:11:5c:42:e5:6d	3006	1	
[x]	3008	1	192.168.0.76
[x]	3009	1	192.168.0.75
[x] 00:0e:d7:89:5b:d5	3016	1	

Update Recording Server

Import IP Phones

Browse...

File uploaded must be text file with fields (MAC address, IP Address, Tap NIC MAC Address, optional label) separated by commas.

Add IP Phone

Enter MAC Address or...

Enter IP Address...

Select Tap NIC ID...

Enter Label...

Add

The bottom sections allow authorized users to add, modify and/or configure MAC addresses.

Tap NICs

ID	Server	Description
[x] 1	voip1	Kingston EtherRx KNE111TX PC

IP Phones

MAC Address	Label ▲	TN Id	IP Address
[x] 00:11:5c:42:e5:6d	3006	1	
[x]	3008	1	192.168.0.76
[x]	3009	1	192.168.0.75

Import IP Phones

Browse...

File uploaded must be text file with fields (MAC address, IP Address, Tap NIC MAC Address, optional label) separated by commas.

Add IP Phone

Enter MAC Address or...

Enter IP Address...

[x] 00:0e:d7:59:5b:d5 3016 1

Update Recording Server

Select Tap NIC ID...

Enter Label...

Add

To add a new MAC/IP address, enter the MAC/IP address in the appropriate box, then use the drop-down box to select the appropriate tap NIC. (HINT: To locate the MAC address of a phone, look for these values in your PBX administration software, somewhere on the phone itself or in the phone's setup menu.) Enter the label to be associated with this address, and use the drop-down box to select the correct protocol. (If you do not assign a label, the MAC address will be used as the default label.) When finished, click Add. The recording server is updated immediately.

The system automatically assigns a channel to the added MAC address and attaches the supplied label. If no label is supplied, the system uses the MAC address as the label so that you can find the station later. After you enter a MAC/IP address and click Add, this section automatically pre-loads the same tap NIC and protocol information, making it easy to add several that share a tap NIC and protocol.

To modify an existing MAC/IP address, click on the MAC address as it appears on the left to automatically display the current information on the right. Make the necessary changes and click Update. The recording server is updated immediately.

Tap NICs

ID	Server	Description
[x] 1	voip1	Kingston EtherRx KNE111TX PC

IP Phones

MAC Address	Label ▲	TN Id	IP Address
[x] 00:11:5c:42:e5:6d	3006	1	
[x]	3008	1	192.168.0.76
[x]	3009	1	192.168.0.75
[x] 00:0e:d7:59:5b:d5	3016	1	

Update Recording Server

Import IP Phones

Browse...

File uploaded must be text file with fields (MAC address, IP Address, Tap NIC MAC Address, optional label) separated by commas.

Modify IP Phone

00:11:5c:42:e5:6d

Enter IP Address...

1

3006

Update

Cancel

Clicking a column header reorganizes the information. A small arrow beside the column header indicates which column the information is sorted by, and the arrow direction indicates whether the information is displayed in ascending or descending order.

IP Phones				
MAC Address	Label ▲	TN Id	IP Address	
[x] 00:11:5c:42:e5:6d	3006	1		
[x]	3008	1	192.168.0.76	
[x]	3009	1	192.168.0.75	
[x] 00:0e:d7:59:5b:d5	3016	1		

[x] 00:0e:47:00:00:00 3014 1

To delete a MAC address, click the [x] to the left of the MAC address.

IP Phones				
	MAC Address	Label ▲	TN Id	IP Address
[x]	00:11:5c:42:e5:6d	3006	1	
[x]		3008	1	192.168.0.76
[x]		3009	1	192.168.0.75
[x]	00:0e:d7:89:5b:d5	3016	1	

Color Codes

This unique feature allows authorized users to define color codes that can be applied to recordings. Color codes can be used in other **OnviCord** applications to rate recordings, recording results, or any other criteria meaningful to your organization. Additionally, they are a valuable tool for finding recordings in a [SEARCH](#) or when generating [REPORTS](#).

To access color codes, a user must be granted any of the following three privileges: System Configuration, Custom Field Management or Evaluation Management. (Privileges are assigned in the **Manager** application.) To configure codes, select Color Codes from the [MANAGE](#) section.

When the color code screen opens, enable a color by placing a checkmark in the Enable box to the right of the color. Enter the new (or changed) text you want affiliated with this color. To disable a color code, uncheck the Enable box next to that color. Enable/disable as many colors as desired. When finished, click Apply.

Color	Title ▲	Enabled
 Blue:	Answering machine	☒
 Brown:	Call after 5:00 PM CST	☒
 Yellow:	Customer call back	☒
 Red:	Hot lead	☒
Green:	Sold tier 2 product support	☐
Magenta:		☐
Lime:		☐
Purple:		☐

Apply Cancel

Color code history

01/30/06 - Red [Enabled]
01/30/06 - Yellow [Enabled]
01/30/06 - Brown [Enabled]
01/30/06 - Blue [Enabled]
12/16/05 - Cyan [Disabled]
12/16/05 - Orange [Disabled]
12/16/05 - Black [Disabled]
12/16/05 - Pink [Disabled]

21.74% of recordings color coded.
Disabling a color code does not clear it from recordings which have previously been color coded.

On the right of the color code configuration section is a history of color codes and a statement that reflects the current percentage of recordings currently color coded.

Color code history

01/30/06 - Red [Enabled]	▲
01/30/06 - Yellow [Enabled]	
01/30/06 - Brown [Enabled]	
01/30/06 - Blue [Enabled]	
12/16/05 - Cyan [Disabled]	
12/16/05 - Orange [Disabled]	
12/16/05 - Black [Disabled]	
12/16/05 - Pink [Disabled]	▼

21.74% of recordings color coded.

Disabling a color code does not clear it from recordings which have previously been color coded.



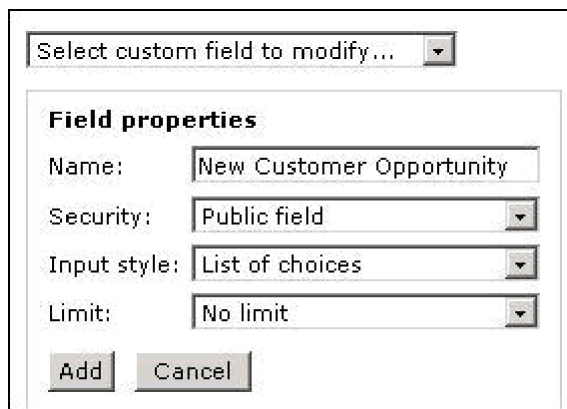
NOTE: Color codes are global. In other words, any user authorized to manage color codes may enable, disable or change the meaning of the color code(s).

Custom Fields

Users with the Custom Field Management privilege can select this option from the [MANAGE](#) section to add or modify custom fields. (Privileges are assigned in the Manager application.) This feature enables authorized users to then associate custom fields with select recordings and quickly locate those recordings in a [SEARCH](#).

HINT: Before setting up categories, read these instructions and review the examples at the end of this section. The examples help explain the setup and functionality of these fields.

To add a new custom field, type its name in the Name box. Custom field names can be longer than 20 characters, but all characters may not show in some applications. Use the drop-down box to set the Security level for this information as Public or Private. Only users with access to private information will be able to view private custom fields.



The screenshot shows a dialog box titled "Select custom field to modify..." with a dropdown arrow. Below this is a section titled "Field properties" containing four labeled input fields: "Name:" with the text "New Customer Opportunity", "Security:" with a dropdown menu showing "Public field", "Input style:" with a dropdown menu showing "List of choices", and "Limit:" with a dropdown menu showing "No limit". At the bottom of the dialog are two buttons: "Add" and "Cancel".

Set the input style as free form text or choices. With free form text, a user can choose what text or numbers to enter when adding custom field information to a recording. With list of choices, a user must select from custom field choices configured here.

Set the allowable Limit for each recording to one of the following:

- No Limit - any number of authorized users can assign choices from this category
- Choice Per User - each user can only add one choice from this category to a recording
- Choice Per Recording - each recording can have only one choice from this category, regardless of which authorized user assigns it

After setting the properties, click Add.



This is a partial screenshot of the same dialog box shown above, showing the "Field properties" section. The "Name:" field contains "New Customer Opportunity" and the "Security:" dropdown shows "Public field".

Security:

Input style:

Limit:

If you designate the input style as List of Choices (as shown), the screen refreshes when you click Add and the Choices section on the right displays. Type the name of a choice you want from within the Custom Field you just created, then click Add. Enter the name of your next choice and click Add.

Field properties

Name:

Security:

Input style:

Limit:

Choices

When finished creating/adding the choices that fall under this Custom Field, you can rearrange them according to value by using the up/down arrow next to each one. Click the UP arrow to move the choice up one level on the list; click the down arrow to move the choice down one level on the list. Click the X to the far right of any choice to delete it.

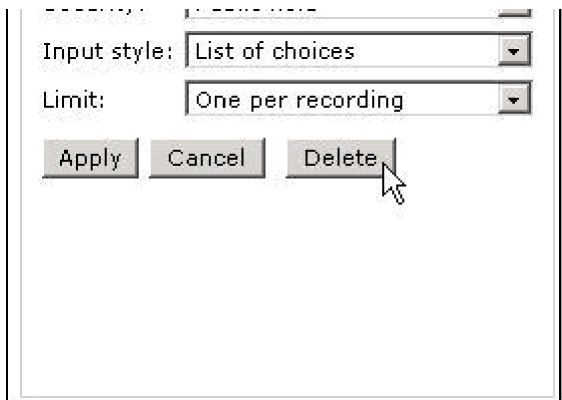
Choices

To delete a custom information field entirely, select it from the drop-down list and click Delete.

Field properties

Name:

Security:



Input style: List of choices

Limit: One per recording

Apply Cancel Delete

Review the following examples before configuring your own custom fields and choices. The examples help explain the setup and functionality of these fields and ways in which to use them.

EXAMPLE A: A large car dealership's Service Department uses OnviCord to follow up with customers. The custom field category (called Time Required) defines how customers ranked the length of time it took to service their vehicle and whether the customers would recommend the dealer to others. Choices the dealer wants within the field (Time Required) category are:

- Slow/Can't Recommend
- Average/Might Recommend
- Fast/Will Recommend

HOW? Click [MANAGE](#) , then Custom Fields. Type the new category name (Time Required) in the Name box, select public or private category, designate Choices as the Input Style, and select a Limit. In this case, a Choice Per Recording allows each customer to rate the service only once per visit. Click Add Field.

Now type each choice (Slow, Average, Fast), clicking Add after each one.

Following a customer's visit to the service department, a dealership representative telephoned the customer and asked how the person rated the speed of service and predict the likelihood he/she would refer friends and family. The dealer quickly saw the results of the follow-up calls in [REPORTS](#), indicating most customers felt repairs took too long and they were hesitant to refer others to the dealership. (See other examples below)

EXAMPLE B: After hiring additional employees, the dealership continued making follow-up calls to customers using a category called Value. This time, choices for Value defined whether the customer felt the price was fair for the service received:

- Great Value/Fair Price
- Average Value/Average Price
- Poor Value/High Price

Now the dealer can search the database and listen to all recordings where a customer received a poor value for the price.

HOW? Under the [SEARCH](#) tab, use the drop-down boxes to define the time period, select the users, channels and/or channel groups. Under Custom Field Information settings, select Poor Value/High Price.

After listening to each recording, the dealer can then follow up personally as a means of improving customer relations.

EXAMPLE C: John, a call center supervisor who monitors outbound calls, needs a custom field called Customer Response with the following three choices:

Very Receptive - Somewhat Receptive - Not Interested

As John listens to recordings, he assigns a rating according to how the customer responds to the call center employee. Using [SEARCH](#) in **OnviCord Web**, he can later look for patterns indicating when customers were very receptive so he determine if callers are more successful on certain days and times.

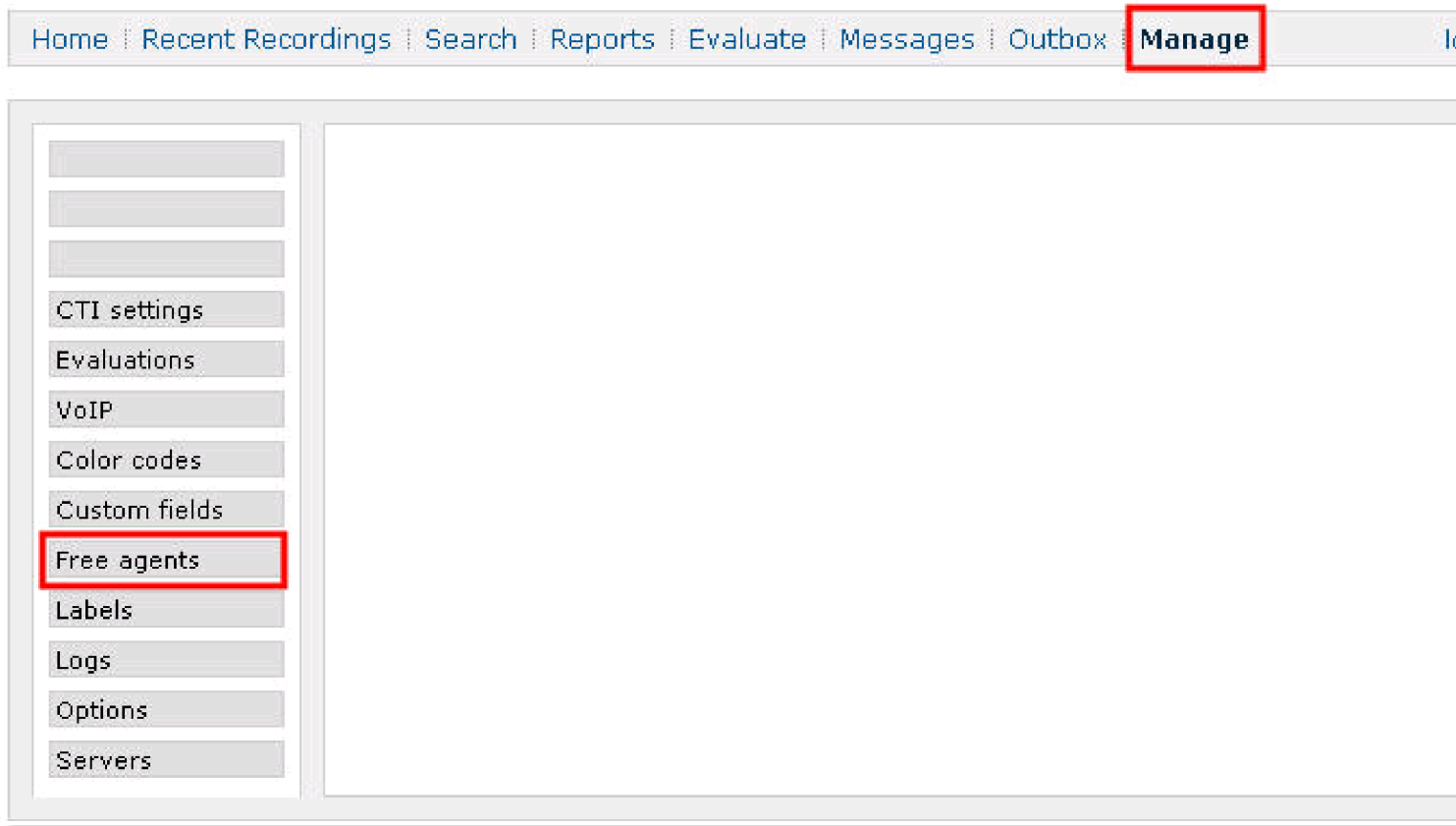
HOW? Click [SEARCH](#) in **OnviCord Web**. Define a time period to search and which users, channels, or groups to search. In Custom Field Information, select Customer Response - Very Receptive.

When the results display, John can listen to each recording, attach Notes, send them to someone via e-mail and/or generate related [REPORTS](#) .

Custom Field information can also be entered by agents during a call via the **OnviCord Agent** application. For more information, refer to the OnviSource **OnviCord Agent** User's Guide(s).

Free Agents

Select [MANAGE](#) and Free Agents to view or manage systems with **OnviCord Agent** installed and are set to Free Agent. (Only those systems you have access to view will be shown.) Authorized users can also manage the agent Login message in the Free Agents section.



The left side shows the Station or computer name, the Channel (channel number or label) and the Agent (user) currently logged on to that machine (if any). Use the scroll bar to see the previous or next free agent systems. Click the appropriate column header to rearrange the order in which the systems are shown. Click the X to the left of a system to delete it from Free Agent status.

The following agents are logged in. Refresh  

	Computer	Channel	User ▲
☐	Seat 4	[4]	None
☐	Seat 5	[8]	None
☐	Seat 6	[6]	None

Import agents
 Browse...

Uploading agents
Files uploaded must be text files with stations followed by channel number, separated by a comma.

Agent properties
Computer:
Channel:
Add Cancel

Login message

Apply ☐ Force login on all free agents



NOTE: It is recommended that Free Agent Seating be administered at each PC within **OnviCord Agent** .

OnviCord Agent must be running on the PC for free agents function to work.

To add a system or change its name, enter the correct name of the computer. Select the proper channel for that system from the drop-down box and click Add.

Agent properties

Computer:

Channel:

IMPORTANT NOTE: If a system designated as a Free Agent machine fails and/or is replaced, you **MUST** launch **OnviCord Web** and delete the failed and/or replaced system from this section of **OnviCord Web** if administered on the PC and not in **OnviCord Web** . Similarly, if you move a system to a different location, you **MUST** launch **OnviCord Web** and revise the station, channel, and/or agent information to reflect the change. If you rename a PC, you **MUST** update **OnviCord Web** if it was set up in **OnviCord Web** . Otherwise, you do not need to.

To import existing agent information (right side of screen), enter the file location or click Browse. Uploaded data must be text files with stations followed by channel number and separated by a comma.

Import agents

Uploading agents

Files uploaded must be text files with stations followed by channel number, separated by a comma.

Free Agent Force Login Message

On the right, enter the Login message users will see when launching **OnviCord Agent** on a system set to Free Agent mode with forced login. To change greetings, type new text in the box and click Update. Place a checkmark in the Force login on all free agents box to force login on every free agent machine. You must have access to all channels to change the message.

The following agents are logged in. Refresh Save Print

Computer	Channel	User ▲
☒ Seat 4	[4]	None
☒ Seat 5	[8]	None
☒ Seat 6	[6]	None

Import agents
 Browse...

Uploading agents
Files uploaded must be text files with stations followed by channel number, separated by a comma.

Agent properties
Computer:
Channel: Select channel...
Add Cancel

Login message

Please login.

Apply ☐ Force login on all free agents

Your message will appear when users set to Free Agent attempt to launch **OnviCord Agent**. The login window they see sits "on top" of all other applications and can't be closed until the user successfully logs in.

Please login.

User:
Password:

Login



NOTE: Even if you set up the force login feature in **OnviCord Web**, you must restart **OnviCord Agent** on every free agent machine before forced login becomes effective.

To save a list of all Free Agents from this section, click the disk icon in the upper right corner.

To print a list of all Free Agents from this section, click the printer icon in the upper right corner.

The following agents are logged in.

Refresh  

	Computer	Channel	User ▲
☒	Seat 4	[4]	None
☒	Seat 5	[8]	None
☒	Seat 6	[6]	None

Import agents

Browse...

Uploading agents

Files uploaded must be text files with stations followed by channel number, separated by a comma.

Agent properties

Computer:

Channel:

Add Cancel

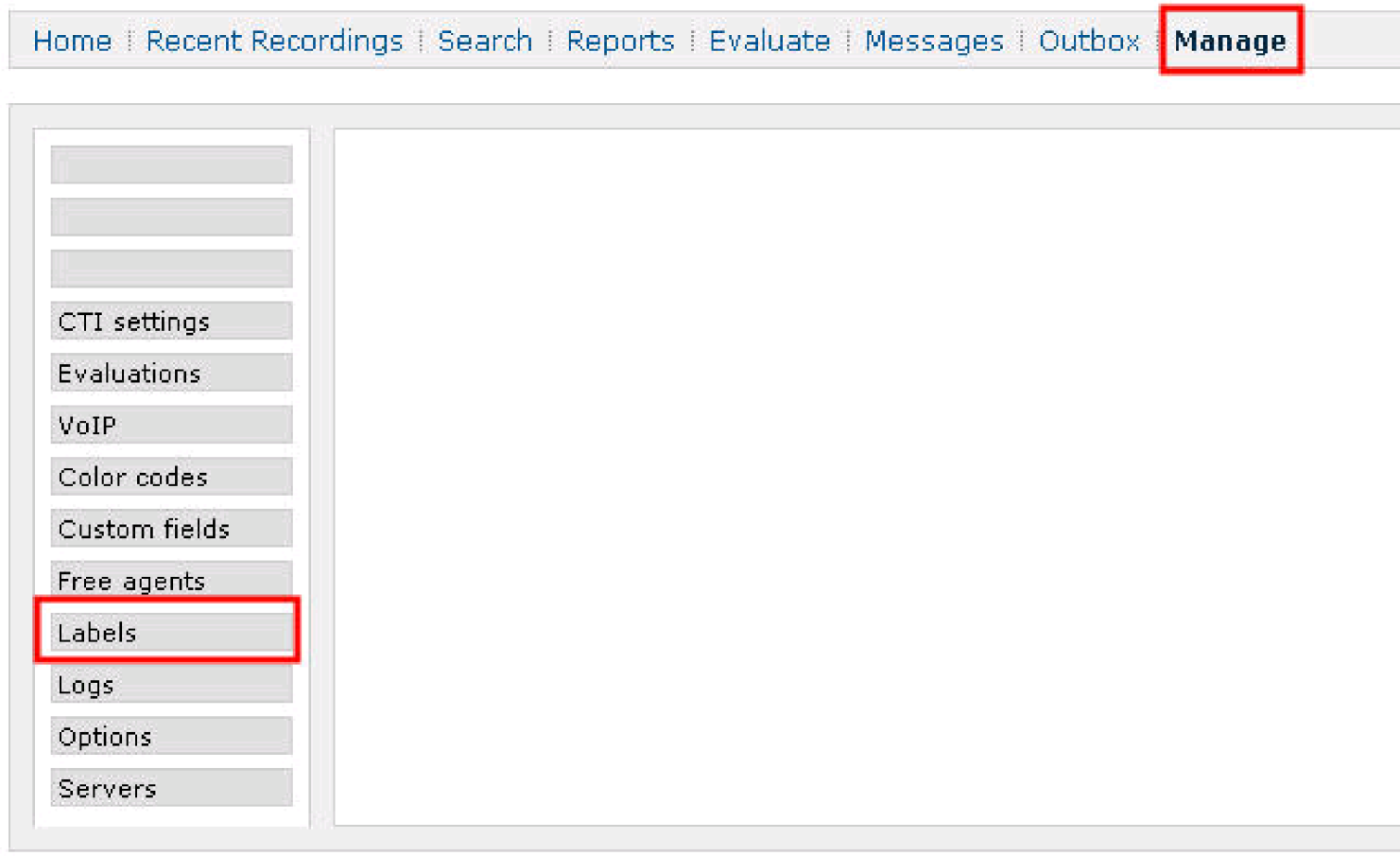
Login message

Apply ☐ Force login on all free agents

Read more about Free Agents in the **OnviCord Agent** User's Guides.

Labels

Assigning labels allows you to personalize your system for easy identification of the user who made the recording and/or the channel where the recording occurred. To label channels, choose Labels from the [MANAGE](#) tab.



Ideally, your **OnviCord** installer completed a User/Channel form when wiring your system that indicates how channels should be labeled **OR** the installer may have labeled your channels for you. To find out, select Labels and open the drop-down box that says "Select label to modify..." If the channel numbers [1], [2], [3], etc., have other information (usually corresponding to extension numbers), then your technician labeled the channels. For example, x0012 [1] indicates your installer labeled channel 1 as extension 12.

HINT: When labeling channels according to extension number, the channel label **MUST** correspond to the actual phone line (or extension) for that channel.

In a "free agent" setting, you might want to use a seat number, station ID, or computer name.

If you have questions about labeling channels, contact OnviSource Technical Support.

On the right is a list showing each channel, channel label and the user associated with that channel (if applicable). Click a column headers to rearrange the columns of information in ascending or descending order with that column as the

primary sort criteria. Use the scroll bar on the right if necessary to see all information.

Chnl	Label ▼	User
[x]	2 x1200	
[x]	3 x0024	
[x]	1 x0012	Hess, Rita
	4	
	5	
	6	
	7	
	8	

To add a new channel label, enter the label name (usually the extension number). Select the correct channel for the this label from the Channel drop-down box. Click Add Label.

Select label to modify... ▼

Label properties

Label:

Channel:

Import labels

Uploading labels

Files uploaded must be text files with labels followed by channel number, separated by a comma.

To change an existing label, select a label to modify from the drop-down box. This displays the existing label name and channel number. Enter the new information and click Apply.

x1200 [2] ▼

Label properties

Label:

Channel:

Import labels

Uploading labels

Files uploaded must be text files with labels followed by channel number, separated by a comma.

To delete a label, select it from the drop-down list and click Delete. You can't delete the actual channel - only the channel label.

To upload an existing list of label information, enter the file location in the Import Labels section or select Browse to locate the file. Files uploaded must be text files with labels followed by channel number, separated by a comma.

Label properties

Label:

Channel:

Import labels

Uploading labels

Files uploaded must be text files with labels followed by channel number, separated by a comma.

Chnl	Label ▼	User
[x]	2 x1200	
[x]	3 x0024	
[x]	1 x0012	Hess, Rita
[x]	4 Seat 404	
	5	
	6	
	7	
	8	

To print a list of all labels, click the printer icon in the upper right corner.

x1200 [2]

Label properties
Label:
Channel:

Apply
Cancel
Delete

Import labels
Uploading labels
Files uploaded must be text files with labels followed by channel number, separated by a comma.

	Chnl	Label ▼	User
[x]	2	x1200	
[x]	3	x0024	
[x]	1	x0012	Hess, Rita
[x]	4	Seat 404	
	5		
	6		
	7		
	8		

EXAMPLE: When wiring your system, channel #1 on block #1 was connected to the phone in Mary Smith's office. Mary's extension is 1223. You might label channel #1 as Ext 1223 to signify extension 1223.

Block #	Channel #	User Name	Extension	Label
1	[1]	Mary Smith	1223	Ext 1223

Because user and channel labels appear alphabetically in some applications (depending on the view settings you select), you may want to remain consistent in your labeling methods. For example, if you label some channels with Extension (i.e., Extension 1223) and others with just an x (i.e., x1224), they will appear on **OnViews** with all channels labeled Extension grouped first, followed by the group labeled with an x.

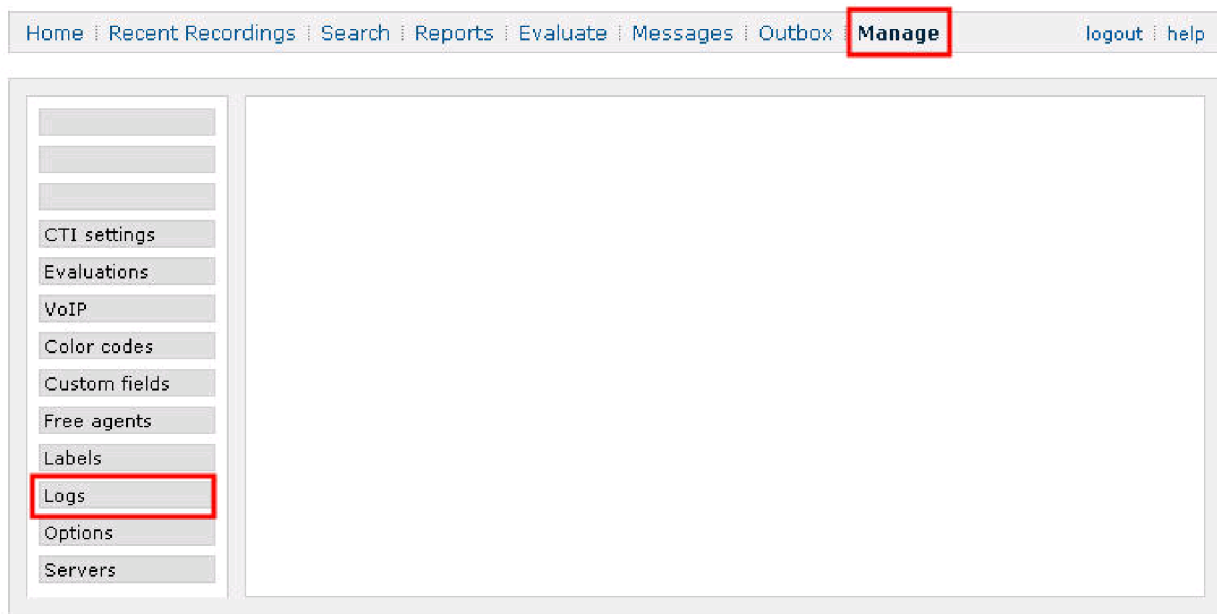
Similarly, if you have some telephones and some radios, you may want to label the radios so they will be grouped together. For example, label telephones as Extension 1223 and Extension 1224, but label radios as Radio 1, Radio 2, etc. For more information, see the **OnViews** User's Guide.

HINT: You may want to label channels using computer names, station IDs or seat numbers since agents may sit in different locations each day.

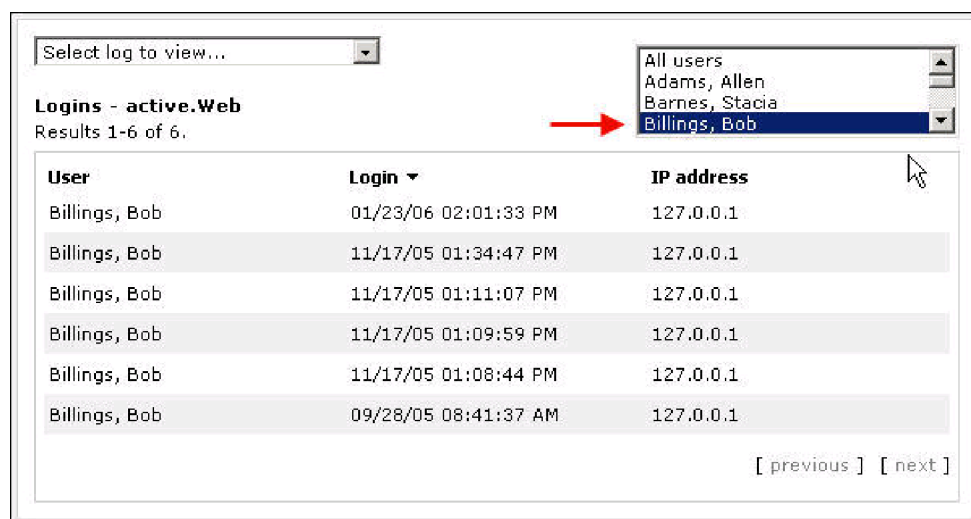
Read about free agents in the **OnviCord Agent** User's Manual

Logs

Users with the appropriate privileges can select Logs from the [MANAGE](#) section and use the drop-down box to view log details pertaining to deleted records (if applicable) or information about recordings not saved, data management, logins to and logouts from client applications (**OnviCord Agent**, **OnViews** or **OnviCord Web**), server alerts, server management and user management features. (Privileges are assigned in the **Manager** application.)



Depending on the log you choose, you can further narrow your findings by choosing from a drop-down list on the right. For example, you can choose to see only **OnviCord Web** logins for a particular user/users.



Each log shows how many records you are viewing of the total number that exist. "Displaying 1-6 of 34" means you are seeing the first six records of 34. Use the Previous or Next button in the lower right corner to see other pages of the log.



Billings, Bob	01/23/06 02:01:33 PM	127.0.0.1
Billings, Bob	11/17/05 01:34:47 PM	127.0.0.1
Billings, Bob	11/17/05 01:11:07 PM	127.0.0.1
Billings, Bob	11/17/05 01:09:59 PM	127.0.0.1
Billings, Bob	11/17/05 01:08:44 PM	127.0.0.1
Billings, Bob	09/28/05 08:41:37 AM	127.0.0.1

[previous] [next]

When viewing logs, click on a column header to reorganize the information with that column as the primary sort criteria or to change the order from ascending to descending. For example, the **OnviCord Web** Login displays the Login (date/time) column with the most recent login first. Click the Login (date) column heading to rearrange the list so the oldest application login is shown first.

Select log to view...

All users
Adams, Allen
Barnes, Stacia
Billings, Bob

Logins - active.Web
Results 1-6 of 6.

User	Login	IP address
Billings, Bob	01/23/06 02:01:33 PM	127.0.0.1
Billings, Bob	11/17/05 01:34:47 PM	127.0.0.1
Billings, Bob	11/17/05 01:11:07 PM	127.0.0.1
Billings, Bob	11/17/05 01:09:59 PM	127.0.0.1
Billings, Bob	11/17/05 01:08:44 PM	127.0.0.1
Billings, Bob	09/28/05 08:41:37 AM	127.0.0.1

[previous] [next]

Some log files have a text file with pertinent information. For example, Server Alerts (which can be viewed by type using the additional drop-down box) shows the date of an alert, the server where the alert occurred, and the type of alert. A text file also contains additional information. To read a text file, click the icon to the right of the information.

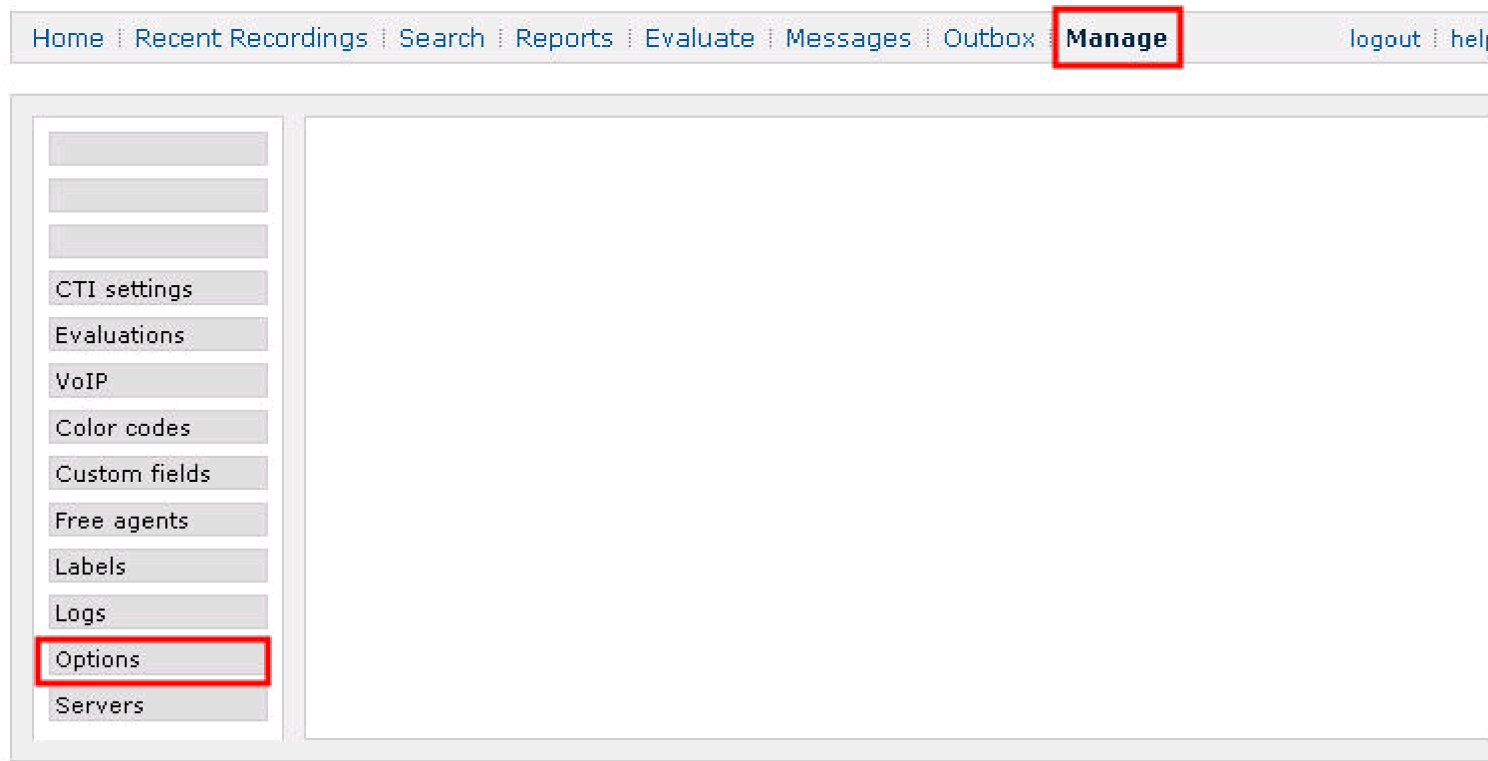
Server alerts		
Results 31-31 of 31.		
Date ▼	Server	Type
03/25/04 01:00:44 PM	vl-dvxe-rec1(172.20.0.50)	Database 

Most log types are self-explanatory. However, within Data Management, you may see some or all of following information, most of which is related to purging:

Type	Meaning
Daily video	Occurs once a day and deletes only .avi files according to purge criteria.
Daily audio	Occurs once a day deletes only .wav files according to purge criteria.
Daily database	Occurs once a day and deletes only database entries according to purge criteria.
Capacity video	Occurs when storage capacity equals or exceeds the storage limit settings in OnViews and deletes only .avi files a
Capacity audio	Occurs when storage capacity equals or exceeds the storage limit settings in OnViews and deletes only .wav files a
Unconditional video	Controlled by Entry/Recording Age Limit settings, occurs during the daily purge and deletes (according to age) onl
Unconditional audio	Controlled by Entry/Recording Age Limit settings, occurs during the daily purge and deletes (according to age) onl
Unconditional database	Controlled by Entry/Recording Age Limit settings, occurs during the daily purge and deletes (according to age) onl
Optimization	Indicates a Database optimization was run. Occurs about once a month.

Options

Use the [MANAGE](#) Options settings on this tab to configure certain security and mail settings.

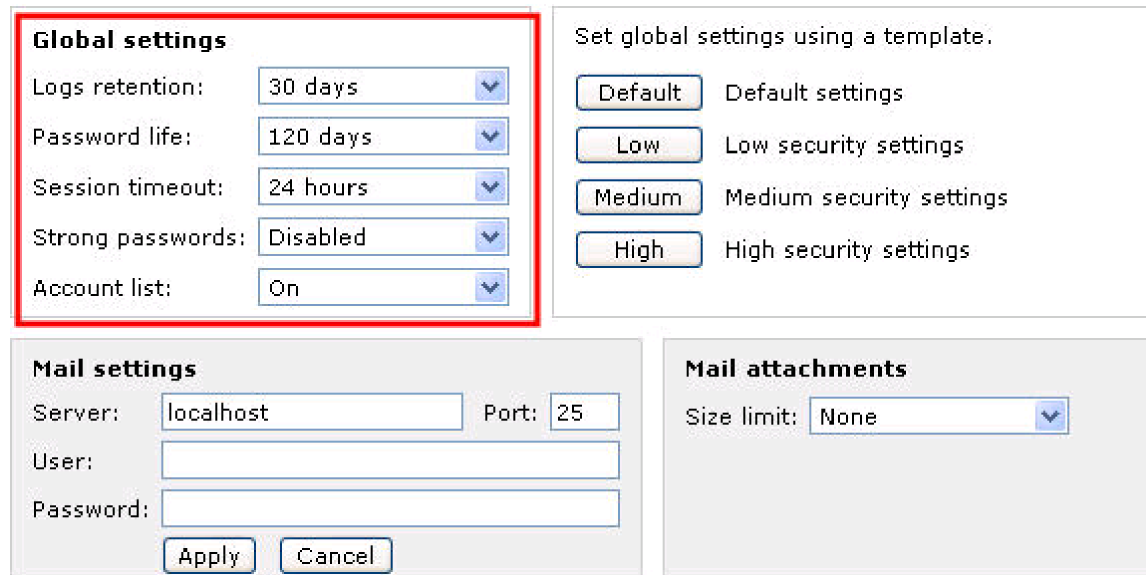


Home | Recent Recordings | Search | Reports | Evaluate | Messages | Outbox | **Manage** | [logout](#) | [help](#)

CTI settings
Evaluations
VoIP
Color codes
Custom fields
Free agents
Labels
Logs
Options
Servers

Global Settings

Use the drop-down boxes in the Options section to set global configurations that apply to all users. Individual user privileges can then be granted or denied by in the Manager application. Each global setting is defined below.



Global settings

Logs retention: 30 days
Password life: 120 days
Session timeout: 24 hours
Strong passwords: Disabled
Account list: On

Set global settings using a template.

Default Default settings
Low Low security settings
Medium Medium security settings
High High security settings

Mail settings

Server: localhost Port: 25
User:
Password:
Apply Cancel

Mail attachments

Size limit: None

Logs retention - sets the number of days before log entries are removed. **NO** recordings are removed, only a list of login activity. (Multiple choices begin at 30 days retention and graduate to five years retention.)

Password life - sets the number of days that elapse before a user's password expires. (Multiple choices range from 30-180 days and include a No Expiration choice.) The amount of time set here can be changed at any time by a user who has permission to [Manage Options](#). (See [Privileges](#)) The default "admin" account password, which accompanied your shipment, never expires.

Session timeout - sets the amount of time that elapses without user activity in **OnviCord Web** until that user's session is automatically "timed out." (Multiple choices begin at one minute and escalate to 24 hours.) The user must then re-enter login information before proceeding in **OnviCord Web** . For security reasons, we recommend session time-outs so users who leave their desktop unattended will automatically be logged off after a certain amount of time.

Strong passwords - enable or disable strong passwords for all users. Strong passwords are at least six (6) characters long, and must contain at least one upper case letter, one lower case letter, and one special character. For security reasons, we recommend using strong passwords. Enabling or disabling the option can be reversed any time.

Accounts list - turns accounts on/off for all users. Your selection here determines how account information is used when performing a [SEARCH](#) and when adding account information on the [SEARCH RESULTS](#) page.

- With the Accounts list OFF, users on the [search](#) page must enter either the exact account information or enter partial account information with the leading and/or trailing wildcard character (% sign).
- With the Accounts list ON, a user selects the account information from a drop-down box. (Customers with an exceptionally large number of accounts may notice a slower response to a search.)

While your selection here may affect performance, you may change your selection at any time.

Rather than configuring these items individually, you may choose from one of the four suggested setting groups on the right.

The following table defines the settings with each template.

Global Template	Logs retention	Password life	Session timeout
Default	180 days	120 days	1 hour
Friendly	180 days	180 days	24 hours
Standard	1 year	90 days	1 hour
Secure	5 years	30 days	20 minutes

NOTE: Regardless of which global template you choose, your accounts list remains set to either ON or OFF, whichever you selected in the global settings section.

Mail Settings

Enter the information for the server used to send mail. If your e-mail server requires sender authentication, ask the administrator of your e-mail server for a user name and password. Enter it here and click Apply.

On the right, use the drop-down box to configure a default maximum size limit for mail attachments (1MB-15MB). If you do not wish to allow attachments to be sent, select None.



NOTE: We recommend that you only use the outgoing mail settings to view your current settings. To configure or modify mail settings, use the E-mail Settings tab within Admin/Alert Configuration in **OnViews**.

If you opt to change mail settings from within **OnviCord Web** , you must restart all services to activate the change.

Servers

Select [MANAGE](#) Servers to view and/or manage servers.

Each server is listed with the host name of the machine and a checkmark box to indicate whether the server is enabled or disabled. If you are authorized to see the Servers tab, you can place a checkmark in the appropriate box next to each server to enable or disable it, but the address and name of a recording server cannot be changed by any user.

Warning: If you are unsure about what to do on this tab, please contact your system administrator or OnviSource technical support.

